

PROADVISOR review

EXCEED!

Overall Rating **9.33**

Product Name

Exceed! By Telosa Software, Inc.



Reviewed By

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Summary

Exceed! Premier by Telosa Software Inc. is a full-featured fundraising, grants management, and guest tracking application that makes it a cinch to nurture and build strong relationships with prospects, volunteers, grantees etc. Exceed! has been designed to help the end user get the maximum return from donors and fundraising activities, and minimizes the time and effort required to reach those goals.

Strengths

Telosa staff are well versed in understanding the needs of the nonprofit organization as the employees of the firm all have nonprofit experience in their backgrounds. Whether they come from the fundraising side of the house, technology, accounting, etc., each and every one understand the pain points of working within the confines of inferior software and manual procedures, and have brought that experience forward to develop a truly quality product. They are passionate about providing the marketplace with a superior product, and with that in mind, the Exceed! Premier application has been designed to provide greater functionality for the following key areas in the nonprofit arena:

Donor, Contact, Fundraising, Membership, Volunteer, Guest and Event Management, Grant Making and Seeking, Online Fundraising Management & Comprehensive Reporting

Limitations

None that I could identify.

Wish List

I do not have any. This product has tremendous capabilities.



Product Ratings	Rating
<p>Setup and Installation: Set up and installation was easy. The documentation is fairly comprehensive, but could benefit from a bit more detail in the "steps" department. I managed on my own, but in all fairness, this company does not leave the end-user to just figure it out. They have an implementation methodology and training strategy so that the end-use customer can go live with ease.</p>	9.0
<p>Interface: The interface is completely seamless.</p>	9.5
<p>Features: Exceed! is easy to learn and use. This product looks so much like QuickBooks that it makes the QuickBooks user just jump right in to learn the product. Exceed!'s market is small to mid-sized nonprofits, and believes the product is key to supporting their mission and garnering their donors. In addition to the already robust capabilities, the most current release of Exceed! Premier 6.5 has many exciting new features including:</p> <ul style="list-style-type: none"> • Fully Integrated Credit Card Processing with IATS for payments of gifts, pledge payments, dues and sales, and process them directly within Exceed! Premier. • E-mail and Direct Mail Marketing with Vertical Response enabling the end user to create and manage professional looking e-mail and direct mail communications • E-mail Address Management to easily find and update incorrectly formatted e-mails across the database using Mass E-mail Verification • Prospect Research with Telosa's partnership with WealthEngine provides access to comprehensive and powerful information about your constituents. • Event Management Telosa's Exceed! Auctionpay Interface was created to help nonprofits manage fundraising events and share event information managed in Auctionpay, including registration, seating assignments, auction donations, and purchases. 	9.5
<p>Ease of Use/Service and Support The product is easy to use and has comprehensive documentation. Exceed! has various support options including a Telosa Annual Support Contract, which provides phone, fax and e-mail support, as well as access to the web-based Client Support Center. The Client Support Center provides authorized users with immediate and essential knowledge for installing, implementing, customizing, and using Telosa products. In addition the support center provides a searchable knowledge base (including frequently asked questions), software updates and a user forum.</p>	9.5
<p>Data Security / Privacy Security is determined at both the Exceed! and QuickBooks levels. The end-user will only be performing the functions or have access to the areas that have been defined by the system administrator.</p>	9.5
<p>Integration with QuickBooks The Exceed! QuickBooks Interface enables seamless integration between your Exceed! database and QuickBooks. Gift, pledge and grant entries made in Exceed! can be automatically posted to your QuickBooks customers, accounts and classes, eliminating the need for duplicate data entry.</p> <p>You will be able to post transactions, produce cash receipts and create journal entries. It is a simple procedure to follow. All that is required is to set up the mappings between the field values in Exceed! and the Classes or Items in QuickBooks and save them. Changes can be made to these mappings whenever the data on either side of the transaction is updated. Pledges create invoices in QuickBooks and pledge payments are assigned against those invoices. When a grant is approved, it is posted to QuickBooks as a payable. When payments are authorized in Exceed! checks are created in QuickBooks. The grantee's address is passed to QuickBooks along with the dollar amount so that it can be printed on the check.</p> <p>The QuickBooks integration supports QuickBooks Pro and Premier and Nonprofit Editions 2002 - 2008</p>	9.0

Ratings Definitions

10.0 (Perfect):
This exceedingly rare score is reserved for a product that is as perfect as it could be.

9.0 to 9.9 (Spectacular):
A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.

8.0 to 8.9 (Excellent):
A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.

7.0 to 7.9 (Very good):
While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.

6.0 to 6.9 (Good):
This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.

5.0 to 5.9 (Average):
A product that scores in this range is functional but unremarkable.

4.0 to 4.9 (Mediocre):
Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.

3.0 to 3.9 (Poor):
A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.

2.0 to 2.9 (Terrible):
A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.

1.0 to 1.9 (Abysmal):
A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.