

Promising Database Feature Comparison for Managing Program Performance and Outcome Data

Database Feature	Downhome Loan Manager (DLM) Standalone System	DLM integrated with Vistashare Outcome Tracker	DLM Integrated with Salesforce.com	The Exceptional Assistant (TEA)	Salesforce	Outcome Tracker	Outreach Systems: Web CATS	Social Solutions: Efforts to Outcomes	Portfol
Contact Info.	downhomesolutions.com			commongoals.com/	salesforce.com	vistashare.com	outreachsystems.com	socialsolutions.com	portfol.com
Strengths	Simple interface, Lower Cost	Adds advanced client tracking available data exchange	Advanced Client tracking and reporting	Wide Feature Set, user accessible database	Advanced Client tracking and reporting, low recurring cost, very powerful and extensible	Advanced Client Tracking IDA support, Flexible configuration and reporting	Flexible user interface, Lower Cost	Wide Feature Set, Strong Support	Wide Feature Set, Strong Support
Weaknesses	Limited Client Tracking Fixed Reporting	Greater complexity	Custom Programming needed, High Development Cost	High Initial Cost, Program Stability	High development cost, 3 rd party pipeline management tools	Reporting System best under moderate loads, no external data access	Some reporting functions limited, no external data access	Higher Cost	Moderate Cost, Lack of Multi-Relationship model limits options for ME Dev orgs. CDFI with moderate to advanced Client Tracking needs
Best Application	Small Lending-Centric CDFI	CDFI with moderate CRM needs	CDFI with advanced CRM needs	CDFI with moderate CRM needs	Development Orgs	Development Orgs	Development Orgs	Larger Scale CDFI or Dev orgs	CDFI with moderate to advanced Client Tracking needs
Estimated Vendor Configuration Fee**	\$2,500-\$10,000			\$20,000.00	\$20,000.00	\$9,500.00	\$1,500.00	\$8000+(quick start) Dependent upon Implementation Size	\$3500-6500
Recurring	TBD			\$4000+/Yr 20% of config	Free for 10 Users, \$30/Mo	\$240/mo for 6 Users, \$10/Mo	3675/Yr for 10 Users	\$8500/Yr Base Tier	\$975 or 20% Config

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Subscription Fees**				fee	additional	additional		ETO Money \$4800/Yr Portals \$2400/Yr	
Loan Processing & Portfolio Management	Yes	Yes	Yes	Yes	3 rd Party Option	No	No	No	Yes
CDFI Processing	Yes	Yes	Yes	Yes	No	No	No	No	Yes
ACH Processing	Yes	Yes	Yes	Yes	3 rd Party Option	No	No	No	Yes
IDA Processing	No	Yes	No	No	No	Option	No	No	No
Real Estate: commercial, housing, facilities & project mngt.	No	No	No	Partial	Custom	Custom	Custom	HMIS/HUD	Yes
Client Tracking	Limited	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Business Tracking	Limited	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Limited
Vendor & other Contacts Tracking	Limited	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Limited

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Outcome Tracking (historical data)	Limited	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Web Based*	No	Yes	Yes	Option	Yes	Yes	Yes	Yes	No
User Web Portals	External-Additional Cost	Yes	Optional	No	Option	Yes	Yes	Option	No
User Created Reports	No	Yes	Yes	Partial	Yes	Yes	Yes	Yes-SAP BI Integration	Yes
Query Builder	No	OT	SF	In development for late 2013	Yes	Yes	Limited	Yes	Yes
User Spreadsheet Import	No	OT	SF	Yes	Yes	Yes	No	Yes	TBD
Externally Accessible DB	Partial	Partial	Partial	Local Version	Yes	No	No	No	Yes
DB Format	Paragon	Paragon/Closed	Paragon/Force	Elevate/DBIS AM	Force.com	Closed	Closed	Closed	Access or SQL
Dashboards	External-Additional Cost	External-Additional Cost	Yes	External Custom Option	Yes	Yes	Limited	Yes	External Custom Option
Dashboard Availability	Manual Upload	Manual Upload	Real-Time	Real-Time (Local Version Only)	Real-Time	Real-Time	Real-Time	Export	Real-Time
Graphic Report	External-Additional Cost	External-Additional Cost	Yes	External-Additional Cost	Yes	Limited	External-Additional Cost	Yes	External-Additional Cost

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Formats									
Custom Fields	Via DLM Support	User Created	User Created	Yes	Yes	Yes	Yes	Yes	Yes
Programming API (application programming interface to use with other software)	No	No	Yes	No	No	No	No	Yes	No
3rd Party Extensions	No	No	Yes	No	Yes	No	No	No	No
Estimated Vendor Configuration Fee**	\$2,500-\$10,000			\$20,000.00	\$20,000.00	\$9,500.00	\$1,500.00	\$8000+(quick start) Dependent upon Implementation Size	\$3500-6500
Recurring Subscription Fees**	TBD			\$4000+/Yr 20% of config fee	Free for 10 Users, \$30/Mo additional	\$240/mo for 6 Users, \$10/Mo additional	3675/Yr for 10 Users	\$3500/Yr Base Tier ETO Money \$4800/Yr Portals \$2400/Yr	\$975 or 20% Config

* Non Web Based, accessible via Terminal Services/Citrix/Etc

** Estimated – Initial Fees are for a small CDFI and are in no way what the vendor may estimate for unique configuration and data conversion fees

Other Database products: VillageSoft/Money In, Money Out, TA (MIMOTA); CounselorMax; Sage ACT!; Combination of Software Packages; NStep; Data Warehouse SQL Reporting; Rite Track; LMS; Microsoft CRM with Microloan Management System (MMS)

Accounting Software Used by Loan Funds & CDFI Intermediaries: Sage Fund Accounting; The Financial Edge; Peachtree; Microsoft Dynamics GP; Microsoft Dynamics SL; Fund E-Z 5; Lawson 3; Sage Accpac; Other (fewer than 3 users): AccountEdge; AccountMate; AccuFund; Agresso Business World; Bookminders; Fiserv; FundWare; GMS; Microsoft Dynamics NAV; Yardi; Voyager; National Information Solutions; Cooperative; PeopleSoft; Sage Products (e.g., BusinessWorks, MAS 500, PFW ERP, Pro ERP); Serenic Navigator

Please note that many organizations also use fundraising database products.