

Databank Essentials

from thedatabank, inc.

Client Agreement

I. Highlights of features and services included in this agreement:

A. The Databank – a customized Nonprofit CRM (constituent relationship management) database and the backbone of Databank Essentials. Store information on up to 10,000 contact records, both individuals and organizations. In addition to contact data, Essentials stores data on contact activities, transactions, and other relational data and provides client specific custom fields. Additional data tables and fields can be added for a nominal setup charge.

B. dBot AI Assistant - Databank Essentials includes full access to the Databank's industry leading proprietary AI Assistant, *dBot*. With *dBot*, Essentials users have access to powerful AI tools to help with: data query and analysis using natural language prompts, copy and graphic creation, report writing, research, instant user support, and other advanced AI functions.

C. Donation and Pledge Tracking (for Databank Essentials Fundraising users) – Track all online and offline transactions, including date, amount, campaign (appeal code), and other details. Includes tracking of recurring/sustaining gifts, memorials, pledges, and soft credits.

C. Donate Form (for Databank Essentials Fundraising users) – A secure online form including a heading, personalized introductory text, up to 4 ask amounts plus “other amount” option, recurring giving options, payment by check, ACH, or credit card, and personalized thank you text. Forms can be edited by the client. Online donations are processed through the Payment Gateway and deposited in the client’s account within 1-7 days after posting. Donors receive an automatic email acknowledgment, and the donation is automatically recorded in the Databank.

OR

C. Meetings & Events Sign Up Form (for Databank Essentials Meetings & Events users) - Publish meetings and events to your website, where visitors can search by date, event type, zip code, and more. Participants sign up online and are automatically added to your Databank. Manage private and public events, access event rosters, email the participants,

record volunteer hours, and track participation history for each member within your Databank.

D. eMarketing Tools – Using our own integrated PowerMail bulk email platform, design HTML emails or use the Drag and Drop editor, add Tell-A-Friend features, and send emails to any segmented list. Bounces and subscriptions are handled automatically and recorded in a contact's Activity History. Access reports on actions of contacts such as click-through or unsubscribe. Templates included. Unlimited email messages included.

E. Communication – Bulk Text Message to a cell phone (\$0.05/text message), mailing labels, and mail-merge are included.

F. Subscribe Form – A secure online Sign Up form, including a heading, personalized introductory text, unlimited number of client-defined subscription options, and a personalized thank you text. Forms can be edited by client. Subscribers receive an automatic email acknowledgment and the subscription preferences are automatically recorded in the Databank.

G. Activity History – The Databank stores a detailed activity history for each record, including the date, type and method of contact, person

who made the activity, and notes. Activity histories are searchable and can be bulk-updated.

H. Data Management – Data entry for additional records, contacts, communication, campaigns, and transactions as needed. The system features

a sophisticated tool for identifying and merging duplicate records on demand.

I. Automatic Address Verification – Address Verification keeps your data standardized and conforms to postal code preferences.

J. Searches – Virtually any field in the Databank can be searched.

Multi-step searches can also be named and saved. Search results can be flagged. Integrated mapping feature. The dBot AI Assistant can also be used for searching your Databank.

K. Reports – Includes on-the-fly Roster and Fundraising

Reports. Select any set of data and output it in a roster format.

One-click

executive reports such as top donors, lapsed donors, campaign overview

and progress reports. All reports can be viewed on screen or

downloaded. In addition, dBot can craft reports for you based on queried data.

L. Exporting Data – Lists can be exported or downloaded in a variety of formats, including mailing labels, text files, vCard, and CSV files. All of your data is accessible for download at any time.

M. Relationships – Links can be created between records in the Databank, with user-defined relationship types and roles.

N. Custom Fields – Up to 14 client-defined fields are included.

O. User Account – Unlimited User Accounts included. The client is responsible for password security. Please keep your password safe and change it frequently.

P. Data Import – Clients have two options to move existing lists into the Databank:

1. Use the Databank's self-serve file import tool.
2. Hire our technicians to import data, billed at an hourly rate.

II. Timeline and setup process

A. Application checklist:

1. Provide your organization's contact information and Federal Tax ID number (online)

2. Review and accept this agreement (online)

3. Provide payment information (online)

4. Set up your [Payment Gateway](#).

B. Accounts are set up within 2 business days after receiving your application. At that time, you will receive a welcome message, your login information, training, and support resources, and further instructions.

C. Databank staff will work with you to create your Subscription and Donation/Meetings forms. The payment processing aspect of the donation form will be completed following payment gateway setup and authorization.

D. You will receive data import instructions along with your login information. Self-serve data import can begin immediately, and requests

for assistance will be assigned to the technical staff.

E. In the event that your organization is disqualified, we will notify you within 14 business days of your application.

III. Pricing and payment

A. One-time setup fee– \$250 charged upon completion of your 14-day free trial.

B. Subscription – The subscription will be paid via electronic fund transfer (EFT/ACH) or credit card, in three-month increments, at the beginning of each rolling three-month period. The first three months will be charged at the time of your 14-day free trial completion. Monthly price tiers are as follows:

Databank Essentials Price Tiers	
0 – 2,000 records	\$99.00
2,001 – 5,000 records	\$149.00
5,001 – 10,000 records	\$199.00

The account price is calculated at the time of billing, and that price is charged in 3-month increments. No refunds or credits will be paid to the client if the record count fluctuates below the billed amount within the 3-month billing periods. No penalties or additional payments will be

required by the client if the record count fluctuates above the billed amount within the 3-month billing periods.

C. Data migration work, if needed, is billed at an hourly rate. The current rate is \$150/hour.

D. 14-day free trial – If you are not satisfied with Databank Essentials within the trial period and wish to cancel service, simply email your request to clientsupport@thedatabank.com.

E. If the database size exceeds the 10,000 record limit, the client will have a 30-day grace period in which to reduce the size. If after 30 days, the database size is still over 10,000 records, an upgrade to a regular

Databank account will be required. Upgrade fees apply and monthly billing will be adjusted accordingly. Contact your Account Representative at any time for information about Upgrade features, Add ons, Upgrade benefits and price estimates.

IV. Additional terms of agreement

A. Maintenance – Electronic backups are performed in real time, and the entire system is fully backed up each day. These backups are stored at a secure offsite facility. System upgrades are provided

automatically as soon as they become available. System performance is monitored 24/7 and adjustments are made as necessary for optimal performance.

B. Training –

1. Ongoing training – Topical group trainings are available at no extra charge for the life of your account, via a live web conference. On-demand video tutorials are also available. Please anticipate and commit to approximately 6 hours of training to learn your Databank features.

C. Support –

1. Support is provided free of charge through the thedatabank's Online Support Center and the Support Request Form in your Databank. The Online Support Center features electronic requests, status tracking, tips and discussion forums for our users. Detailed User Guides are also available through the Databank's Help menu.

2. Support requests will be answered Monday through Friday from 8:00 AM to 6:00 PM Central time.

3. Additional Paid Support: Phone support is available for \$150 per hour, charged in 20 minute increments, \$50 minimum per call. Phone calls are billed and charged to the client's billing credit card immediately following completion of the call.

D. Data Access and Administration – The Client is responsible for data entry and data integrity.

E. Rights to Data and Application – thedatabank, inc. retains ownership and all rights to the application, including program codes and interfaces. The Client retains complete ownership of all related member data that is input and or derived from the use of the system. thedatabank, inc. will not at any time rent, exchange, or use any client data.

F. thedatabank, inc. is responsible for the security of credit cardholder data that we handle, store, process, or transmit on Client's behalf.

G. No Spam – thedatabank, inc. has a strict anti-spam policy. Any client found to be using the Databank for spam will be immediately cut off. The full policy is available at www.thedatabank.com.

H. Security – All client data will be maintained in a “Tier 1” secure data server environment with state-of-the art security. Access to the database requires a password. Data is encrypted in transmission using SSL encryption.

V. Length of Agreement – This is a perpetual agreement. Either party may terminate or cancel this Agreement at any time for any reason by giving thirty (30) days written notice to the other party. The Agreement and service will be terminated at the first of the month after the 30-day notice has been received.

Please contact thedatabank, gbc at 612-455-2255 or info@thedatabank.com if you have any questions prior to accepting this agreement.