EveryAction Product Description

February 2025

Product Summary	
EveryAction is a multi-channel marketing platform used by non-profits to increase supporter engagement and donations. Its target audience is fundraising professionals, digital marketers, and organizers. It empowers users to raise more money online and off, increase supporter engagement, and reduce pressure on staff resources.	
Term *Abbreviations, acronyms or proprietary terms used across the unit*	**Definition** *Meaning of the abbreviations, acronyms or proprietary term provided.*
ACH	Automated Clearing House is the primary system used for electronic funds transfer (EFT). In EA, it is how supporters make online donations directly out of their bank accounts.
ActionID	How users are authenticated in our system. The ActionID is our user id.
ActionProfile	Contact data stored for pre-filling online forms.
Activist Code	Activist Codes are tags, or labels, that can be applied to individual records to help track information like interests, roles, and other ways in which supporters are engaged with an organization
API	Application Programming Interface
AWS	Amazon Web Services
CAD	Canadian dollar
CAL	Create a List
CEE	Changed Entity Export
click-to-call	Tool that automatically connects caller with advocacy target (representative)
Committee	In EA, each client (non-profit organization) has at least one Committee in the CRM through which their users access the platform.

CRM	Customer Relationship Management
CRUD	Create, Read, Update, and Delete; the four basic functions/major operations which are implemented by databases
DAR	Duplicate Analysis Report
DB	Database
Designations	Designations represent financial entities. An organization typically only needs one Designation, though sometimes they may have more. For example, Designations can be used to distinguish between c3 and c4 donations.
DSRF	Data Services Request Form
EA	EveryAction
ETL	Extract, transform, and load (ETL) is the process of combining data from multiple sources into a large, central repository called a data warehouse
EUR	Euro
FastAction	Feature that stores credit card and contact information for supporters. Allows '1-click' donations.
GBP	British pound sterling
MiniVAN	Mobile canvassing app
MMS	Multimedia Messaging Service – text messages (SMS) with images, video, or emoji
Moves Management	A feature set that assists in the process of moving a prospective donor from cultivation to solicitation
NANP	North American Numbering Plan
OA / Online Actions	Form and Page Builder
OpenVPB	No ActionID login required version of VPB (see below)
Optimized Ask	EveryAction's proprietary algorithm that provides the best 'ask amount' for next online solicitation
PII	Personal Identifiable Information
QLU	Quick Lookup

Recurring Contributions	A contribution that is set to recur after a chosen duration. Example, a supporter sets up a recurring $10 donation that will be given every month.
Saved Lists	After executing a search, the list of returned Contacts can be saved to a recallable, static list
Saved Searches	Search parameters are saved and can be rerun at any time to refresh the list of contacts
SFTP	Secure File Transfer Protocol (SFTP) is a network protocol for securely accessing, transferring and managing large files and sensitive data
Smart Links	A Targeted Email feature that allows users to easily link forms and add ask strings (suggested contribution amounts)
SMS	Short Message Service; commonly known as texting
SQL	Structured query language (SQL) is a programming language for storing and processing information in a relational database
TGE / Targeted Email	EveryAction's email creation and sending tool
Turf Cutter	An EveryAction feature that allows users to create lists of contacts by drawing shapes on an online map
UI	User interface
USD	United States dollar
User profile	A set of permissions/security functions that grants users the right level of access to the platform
User role	A pre-defined set of permissions/security functions that grants users the right level of access to the platform based on core functions/roles
UTM	Urchin Tracking Module are variants or URL parameters. They are used to measure the effectiveness of online marketing campaigns.
VAN	Voter Activation Network
VANID	Our platform's unique contact record identifier
VPB	Virtual Phone Bank - online tool to allow volunteers/staff to make calls and record information
VPBConnect	Virtual Phone Bank Connect – an "autodialer" version of Virtual Phones Bank that will attempt to connect a caller to the next person automatically.

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Administer a CRM

Business Process 1: Administer Access to a CRM	
CRM administrators onboard and manage access to EveryAction so that they can perform roles central to running the organization's programs and campaigns that engage supporters.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As an administrator I can add, manage and remove users accounts	**Manage Users** – Create and Add Users – Send a new User a welcome email to establish an ActionID account or so the user can link to an existing ActionID – Deactivate a User – Set a User account to expire after a certain date – Impersonate a user so that I can support a user by seeing the database with the same access rights they have – Conduct Bulk Actions on a set of User accounts including export, deactivate, set expiration data, add/remove to committees
As an administrator I can make sure that users can access the EveryAction features they need to do their job.	**Manage User Profiles** – Create and Edit User Profiles – Deactivate a User – Assign User Profiles to Users or Assign User Roles to Users in Package-managed clients Delegate User Profile Management to other Users
As an administrator I can delegate access and control to sections of the database to affiliates, programs, and campaigns to a set of users.	**Manage Committees** – Create and Edit Committees to represent an organizational structure – Assign a parent Committee to a Committee – Link and unlink Users to a Committee to give them access to the committee – Limit the Contact records available to the users of a Committee to a Saved Search – Limit the Contact records available to users of a Committee to those Contacts that are manually flagged – Link and share tagging objects to a Committee such as Activist Codes, Survey Questions and Notes Categories – Link and share data enrichment objects to a committee such as Targets and Scores. – Link and share Scripts and Report Formats to a Committee

As an administrator I can restrict which contacts in the database are accessible to users so that they only access those records that are appropriate for their work	**Manage Contact Access** – Restrict access to the Contacts a User can see by assigning them access to a Committee – Restrict Access to a User can see by creating a Custom Turf and assigning to a User so they are constrained to seeing those Contacts

Differentiation rationale
Explain why you consider each of the capabilities marked with D as differentiators.

Committees in a stand-alone database are a key differentiator for EveryAction because they allow organizations to create a database structure that mirrors their organization.

Committees are used first and foremost to delegate management down throughout the organization. This enables administration and use of the database without dependency on a national staff performing administrative functions for all others and to allow for a set of shared work (whether it be the work of an affiliate, a department or program) too be run in a collective, but focused way, inside of a Committee.

Note, that child Committees in sites where datasharing is enabled also can limit Person Access for the users of a child committee and is described below.

There are a variety of options for setting up national organizations that have one or more of the following scenarios they are managing:

- Affiliates or chapters where the organization would like to give appropriate access to each affiliate. This is true with many clients such as Planned Parenthood and SEIU.
- Departments where the organization would like to give different access to members of different departments. For example, an organization might like to give different access to the Organizing or Fundraising departments versus the Marketing/Digital department as is the case of Audubon. This can often be the case for political organizations as well and creates a larger challenge if they have disclosure report requirements.
- National and regional program where they'd like to break down the country into various geographical segments. Everytown used VAN/EA to address such problems.

Business Process 2: Internationalization and Translation

CRM administrators need to support more than one language in the tools staff and volunteers use and in external communications to supporters. In certain instances, this is a legal requirement. Additionally, organizations conduct fundraising and outreach activities outside of the main country of use and need to be able to record information that uses different formats.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a CRM administrator, I want to make the platform available in an additional language.	**Set an additional language database level for the CRM** – Part of database setup that involves staff members – Unique to country and language (US-Spanish) – Users can toggle between languages – Targeted Email (TGE) is translatable into French

	Clients provide translations for CRM platform – Translation mode functionality – Clients provide translations string by string on their site
As a CRM administrator, I want to be able to record information about my supporters who are outside of our country of operation	**Add/Edit/Import Non-US Addresses** – Quick Add + Contact Details Non-US Addresses – Importing Non-US Addresses via Bulk Upload and Bulk Import API – US address validation – DB country specific address validation - support (CA, UK, AU, BM)
	Add/Edit/Import International Phone Numbers – Automatic Country + Country Code Detection when entering number – Quick Add + Contact Details Non-NANP (North American Numbering Plan) Numbers – Importing Intl. Numbers via Bulk Upload and API – DB Country specific number validation (CA, UK, AU)
As a Digital Marketing Manager, I need to be to communicate with my supporters in French or Spanish	**Online Actions Non-English Forms** – Online actions forms, excepting Advocacy & Event forms are available in French and Spanish
As a CRM administrator, I want to ensure our organization can accept contributions/donations in non-US currency.	**Legacy Stripe Integration supports limited non-US currency** – Process gifts in USD, CAD, EUR, GBP – Settle gifts in USD – CRM "Amount" field represents USD settlement amount – Processing Amount and Processing Currency field represent processed amount and currency – Available in CAL and reporting – All CRM aggregates based on amount in USD

Business Process 3: Customize Data Fields

There are often specific aggregates or pieces of data that organizations need as part of their reporting or as part of their standard operations that are not supported completely or with the desired specifications in the standard data model. Custom data fields allow clients, with some limitations, to enter or calculate data for their specific needs.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As an administrator I need to store sets of fields that model common organizational needs that are not provided as first party fields in my CRM	**Contact Object Custom Fields and Custom Field Groups** – Create a custom field group to associate related fields together. E.g., a custom field group called

	School Info could contain grade, class level, teacher name – Create a custom field and assign a data type of text, long text/note, lookup field, date, numeric – Associate multiple look up fields in a Custom Field Group so that they conditionally control the values in a secondary custom field to those relevant to a parent or primary custom field. E.g., if a City custom field is associated with a State custom field only show and allow the cities that are in the selected State – Search, View, Export, and report on Custom Field values in core CRM capabilities as if the Custom Field were a first party field
	Contribution Object Custom Fields and Custom Field Groups – Create a custom field group to associate related fields together. E.g., a custom field group called School Info could contain grade, class level, teacher name – Create a custom field and assign a data type of text, long text/note, lookup field, date, numeric
	Contribution Aggregate/Calculated Custom Fields – Create and name a custom field aggregate for a contact based on financial giving – Determine the type of aggregate: average, max, total, most recent or comparison – Calculate for an individual or for a Financial Household – Select the range: lifetime, calendar year, month, or custom range – Optionally, select Designations to be included in the calculation – Optionally, select whether to include soft credits and attribution – Optionally, select whether to include Pledges – Optionally, select which Campaigns, Channels, General Ledger Funds, Revenue Streams, Source Codes, Payment Methods or Custom Contributions fields to restrict

Manage Data in the CRM

Business Process 4: Manually Enter Supporter Data
Information about contacts is often collected offline or stored in notes taken by staff or volunteers, on a case by case or small group basis, users need an easy and lightly structured way to enter this information.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a non-profit/union organizer I need to enter data collected on supporters manually. This data was likely collected via paper canvassing or phone banking.	**Manually enter data on supporters collected by staff or volunteers** I want the data on my screen to match the order of the data on my printed sheets. (script sort options). The list of people on my screen should match the list of people on my sheets of paper (list numbers) – Grid View: Shows a grid of people and response options, allowing for quick data entry. Only see the survey questions, activist codes, and other data points for data entry – Script View: Enter data in context with the script it was collected on. This view is essential for virtual phone bank (and the page ContactDetailsScript is leveraged for VPB) – Form View: Enter data as it appears on a printed form. Matching the format of a printed form makes it easier to enter data as there is less margin for error since the form on the screen mirrors the printed form. (Note: Form view is leveraged other places in the system, including MiniVAN)
As a non-profit/union organizer I need to enter data collected on supporters manually on a one-off basis.	**Quickly do one-off data entry on existing contact records** For one-off, or small lists of data entry, I want to be able to quickly add data points to contact records without needing to go to the contact record page for each record. I often will need to add the same data point to multiple records, such as adding the same survey question or a tag to multiple records. Quick Mark: Add a data point to a record (or multiple records) by searching via Quick Lookup, and then applying the data point without needing to go to contact details. Reduces the number of clicks for one-off data entry.
As a non-profit/union organizer I want to create new records and add data to those records quickly.	**Quickly add new contact records and associated data** Quick Entry: Allows users to add new contact records (individual or organization records) and data entry in the same step. Data entry supported in this workflow is

	mostly contribution data and compliance related data points.
As a nonprofit fundraiser, I want to quickly enter contributions and group them in batches either by date received or date they were settled in the bank.	**Enter and manage contributions with Financial Batch Manager** – Track contributions as a group to easily reconcile contributions with bank statements or other external records – Leverage quick entry configuration to create customized templates with the information/fields you want to see when manually entering contributions and creating financial batches – Auto-generated batches are automatically created daily to group contributions made via Online Actions or Recurring Commitments

Business Process 5: Importing Bulk Data into the CRM	
As part of CRM migrations for new clients and ongoing operations for existing clients, CRM administrators need to be able to add or update data in bulk, whether this is a full transfer from an old CRM or part of syncing or adding data from another system or database of record to EveryAction.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As an administrator, I need to be able to add data and records to my database at scale and allow others to do so as needed.	**Bulk Upload Contacts & Bulk Apply Data** – UI that provides step by step guidance and field mappings to add new data or update existing data via .csv, .txt, .xls(x) or various compressed formats – Automapping & field detection based on the first-row headers of the uploaded file – Shareable template creation of mappings for regular file formats and use cases – Create new contacts with minimally required fields – Update existing contacts based on comprehensive match criteria or unique keys (VANID, EA Client ID, Raiser's Edge ID, etc) – Choose to apply or append data in addition to mapped fields, as a part of upload. Allow for hundreds of fields to be mapped to or set. For example, Apply an Activist Code to all of the records being added or updated from the source file. – Data object and field specific security options

	– Extensive data object validation to ensure completeness of added information – Preview a sample of the uploaded and appended data – Options to prevent overwriting of existing data at overall file and individual data object level
As a developer for my organization, I want to be able to programmatically add data to our CRM from business processes that take place outside of EveryAction.	**Bulk Import API** – Allows developers on the client side to apply upload for creating or creating and update contacts programmatically at scale – Bulk Import Job consists of an Upload File and a Mapping Definition. – Mapping options tied to API key. Use GET /bulkImportMappingTypes to see available types – Users can define field mapping in APi call as part of the import
As an administrator, I need to ensure the quality of the data being added and the overall integrity of our database and want some restrictions and safeguards built into the bulk adding of data.	**Administer Bulk Upload Batches** – Analysis of matched vs new records to provide insight into quality of data and set expectations – Advanced error reporting to document records that could not be completed and why – Final approval of Bulk Upload as a separate action to better protect integrity of the database – Additional option to provide extra approval security for larger file uploads
As an administrator, my database is too large and complex to successfully use the bulk upload or import tools to migrate my platform or sync data from other platforms we use.	**Data Services Custom Imports** – DSRF's process that enables sales to provide clients quotes for custom work as part of migrations or additional data syncing and ensures data services only undertakes work that is agreed upon – DSRF's to cover data hyenine, platform upgrades (Oberon to NGP8), migrations, etc. – Customized Union Importers: NEA (AVNMW) Importer, Tsunami/SEIU Custom Membership importer
As an administrator, I want to take advantage of the data available in my corresponding Voter File based database to help me maintain more complete contact information and reduce duplicated efforts across my databases. **Note:** This is mainly used by Advocacy clients	**VAN Relay** – Information into one database, it will search your other database to find a match and automatically add the information available on that contact. – The information shared in the **Relay** includes: Date of Registration, Party, Registration status, Date of Birth, Vote History (Even-year Primary/Generals only), Scores (Upon Request and Admin Approval)
As an administrator working on our financial information, I need to be able to reconcile contributions and ensure that metadata	**Bulk Upload (Edit) Contribution Data**

associated with a group of contributions is standardized and correctly recorded.	– Using Contribution ID as a unique ID, you can map data in a file to corresponding contribution related fields – Users can make bulk adjustments to contributions recorded in the CRM to record refunds, bounced checks, fraud etc. – Users can edit existing contribution meta data like Source Code, cost center, bank account and general ledger fund

Business Process 6: Steward my database and keep my data clean	
Information about contacts and contributions can come from various sources; we need mechanisms to ensure that we are not duplicating contacts or incorrectly recording contributions in the CRM and insight into the change history for core objects.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As an administrator rely on a matching algorithm that helps ensure that incoming data from any entry point will be matched and merged to an existing record to avoid duplicate records	**Contact Matching** – Consistent matching process for Bulk Upload, Form submissions, and through API submissions – Leveraging of personal identifying information (PII) such as name, phones, emails, addresses, and date of birth to identify existing records. – Use of "smart name" lists to ensure that common first names match in different informal forms – Use of Soundex for matching on last names to eliminate matching issues around hyphens, spaces, and common misspellings – Use of partial matching of names and addresses in order to identify matches when strings don't exactly match. – Leveraging of both first party ID (VANID) as well as external IDs to provide priority matching when integrating between two systems. For example, storing a SalsaID when migrating over from Salsa.
As a data manager, eliminate a duplicate record by merging two records representing the same contact.	**Contact Merge** – Find possible duplicates by selecting a set of fields to search for possible duplicates – Allow a user to select two possible duplicates to view and confirm they are actual duplicates – Allow a user to merge two duplicate records – Losslessly preserve data that is stored in related tables when merging two records together – Allow the user to select what data is preserved on a Contact record when the data is stored in a

	singular field on the contact record (as opposed to a related table) – Merge the two records into a single record by keeping one record and suppressing the other record
As an administrator, enlist the Data Service for merging duplicates in bulk	**Duplicate Analysis Report (DAR)** – Receive a DAR report run by the Data Services team that provides a list of possible duplicates to be confirmed by an administrator. The DAR provides a certainty score for each potential match and a source of the match – Data Services processes a DAR report which bulk merges duplicates confirmed by the administrator
As an administrator, store external IDs from other systems that my organization uses so that these ID's can be used to match records and identify potential duplicates	**Contacts External IDs** – Create and name an ExternalID type for common externalIDs (Bonterra Staff) – Define the externalID as numeric or alphanumeric (Bonterra Staff) – Define whether the ExternalID will be unique to a single VANID or whether multiple external records could expect to have the ID. If unique, it can be used for Contact Matching. (Bonterra Staff) – Share the ExternalID to the appropriate clients (Bonterra Staff) – Bulk upload externalIDs to existing records – Use ExternalDs in matching when running Bulk Upload and when using the API – Export ExternalIDs using Exports to facilitate linking data to external systems **Contributions and Recurring Contributions ExternalDs** – Create and name an ExternalID type for common externalIDs (Bonterra Staff) – Define the externalID as numeric or alphanumeric (Bonterra Staff) – Expose the externalID on Contributions and Recurring Contributions
As an administrator, monitor the audit trail so that I can understand why data is not showing up as expected on my core objects such as Contacts and Contributions.	**Audit Trail** – Show who, what and when data was changed on a contact record and related entities such as email addresses, phones, and addresses – Show an audit trail than indicates the changes to a user's email opt in status – Show an audit trail than indicates the changes to a user's SMS opt in status – Show and audit trail on financial transactions

<table>
<tr><td colspan="2">Business Process 7: Manage the “database of record” for the Non-Profit Supporter domain</td></tr>
<tr><td colspan="2">Administrators expect to be able to do the basics of supporter management by recording, editing, and removing key points of data about their contact records.</td></tr>
<tr><td>Use Case(s)
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The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.</td></tr>
<tr><td>As an administrator responsible for tracking my organization’s supporter and donor engagement, I can manage a repository of key domain objects as my organization’s “database of record”</td><td>Manage Key Domain Objects

Model objects as the map to the Non-Profit domain
Provide standard one-off operations for creating, reading, updating and deleting (CRUD) through Detail Pages in the web API
Provide bulk CRUD operations for adding and updating through the web interface
Provide bulk CRUD operations for updating through the API
Support the following key objects:

Contacts
Households
Demographics
Addresses
Phones
Including managing phone and SMS opt in
Emails
Including managing email op in
Notes
Contact History
Contributions
Recurring Contributions
Pledges
Debts
Disbursements
Relationships

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<tr><td colspan="2">Business Process 8: Collect and store supporter activity</td></tr>
<tr><td colspan="2">Track and report on nearly any type of supporter engagement activity, plus the ability to survey supporters.</td></tr>
<tr><td>Use Case(s)
How users will perform tasks to achieve their goal</td><td>Capability
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As a strategic user of the CRM working to increase supporter engagement, I need to track, view, report, and analysis my supporter's historical engagement	**Contact History** – Create a record of outbound attempts to engage a supporter including the campaign, channel and effort – Create a record of the outcomes from an outbound attempt to engage a supporter and associate this outcome with attempt that led to the engagement – Track the staff member or supporter who contacted the supporter when the attempt was made by an individual – Associate the success contact history with the data collected from the supporter engagement so that one can understand what activity was generated by the attempt. This includes knowing what Events were signed up for, what contributions were made (limited cases), what Notes were gathered and what Survey Questions were responded to **Survey Question Responses** – See how my supporters have responded to a set of questions that they have been asked – See both their current response as well as a transactional history of how they have responded the same question over time **Event Participation** – Track a supporter's historical participation in an organization's Events – Track the role they placed in participating in an Event
As strategic user of the CRM working to understand the impact of my supporters, I need to track the supporter engagement that my supporters generated	**Contact Attribution and Soft Credits for Contributions** – Allow for a contribution to be associated with a Contact in order to indicate the supporter who was responsible for raising the contribution – Allow for an Attribution Type to be associated with the attribution to indicate whether it was related Board Member Giving, Corporate Matching, Donor Match, Workplace Giving, etc. – Allow for the attribution to be split by amount or percentage when more than one Person is responsible for the contribution. – Support a workflow to thank the supporter or supporters who are attributed as responsible for the contribution – Bulk Apply attribution values through Bulk Upload – Bulk Edit attribution values through the Financial Batch Manager – Search on attributed gifts aggregates, including in combination with direct gifts or separately – Include attributed gifts in the Custom Calculate Fields **Contacted By/Recruited By**

	– Allow for tracking efforts by supporters on behalf of the organization – Track which supporter made phone calls via Virtual Phone Bank or Open VPB – Track which supporter canvassed or made a face-to-face contact with MiniVAN – Track which supporter is responsible for recruiting and turning out a supporter to an Event
As a strategic user of the CRM, track the overall engagement of supporter over time.	**Engagement Points** – Allow organizations to create a currency of engagement by assigning points to activities participated in so that that the work a supporter does on behalf of an organization can be measured quantitatively. – Allow for points to be assigned to each type of Form Submission that a supporter makes. For example, submitting an advocacy form can provide more points that submitting a new sign-up form. – Allow for points to assigned for each Event Participation by a supporter with the point to vary based on the role of the supporter in the Event. For example, an Event Host will earn more points than an Attendee – Allow for points to be assigned to a supporter based on being assigned a multi-assign Activist Code with each assignment indicating an action take on behalf of the organization. – Allow for points to be assigned based on Survey Question responses that are deemed to indicate engagement by a supporter – Generate a centralized table of Engagement Activity based on the above so that a user can easily search on users based on their historical activity and when it took place – Report on Engagement Points in order to recognize supporters and to identify trends in supporter activity

Business Process 9: Tag and code data	
Add 'metadata' to data for better organization, targeting, reporting, and analysis.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a CRM user, I need to be able to code and tag my data so my organization can flexibly create	**Activist Codes** – Create an Activist Code – Make an Activist Code "single assign" to apply a binary coding,

groups and associations between like data	– Make an Activist Code that is “multi-assign” to allow for a code that can be applied repeatedly with a date associated with the coding – Include Activist Codes as part of a Script so that supporter interests can be solicited – Share an Activist Code with other Committees to standardize coding across the organization **Tags** – Create a Tag – Organize a tag in a hierarchy by assigning it a parent Tag – Make a tag available for Contacts, Events, and/or Locations – Share a Tag with other Committee to standardize coding across the organization
As a CRM user, I can determine what channels and efforts are source of data that is added to my CRM	**Source Codes** – Create a Source Code to be associated with a Channel, outbound effort or segment so that inbound activity such as contributions and supported engagement can be associated with the effort that generated the engagement – Organize a tag in a hierarchy by assigning it to a parent Source Code – Share a Source Code with other Committees to standardize coding across the organization **Campaign and Channel** – Associate a Source Code with a Campaign and Campaign Type – Associate a Source Code with a Channel and Contact Type (for example: Email: Bulk Email” **General Ledger Codes and Revenue Streams** – Associate with a Revenue Stream so that inbound contributions can be attributed a revenue stream when posted to the general ledger – Associate with a Cost Center so that inbound contributions can be attributed a cost center when posted to the general ledger

Business Process 10: Enrich my supporter data

EveryAction can append data from different sources and build aggregates based on supporter action to further clients’ engagement and conversion efforts.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a CRM administrator I can enrich data on my Contact records so that I can better understand how to interact with them as supporters	**Scores** – Create a Score slot for uploading a modeled score from a data vendor – Define whether a Score is a distinct value or bucketed into a range – Upload a model via the Score Loading API – Search, segment and target based on Scores – Report and analysis results based on Score segmentation **Donor Trends (add on)**

	– Search and create segments based on donor models by tier, cluster or score – Use retention search fields to target existing donors – Use upgrade search fields to target supporters capable of giving larger gifts – Use sustainer search fields to target supporters likely to convert to sustainers – Use lapsed donor search fields to target supporters who have not given recently **Demographics and Political Data (when connected to a Voter File platform)** – Date of birth – Sex – Voter Registration Status – Voting history – Registered party – Early vote status **Districting** – Congressional district – County – State legislative districts
As a CRM administrator I can enrich data on my Address records so that I can better understand where to interact with my supporters	**NCOA (Data Service)** – Do a National Change of Address lookup against a customer's database – Provide a new address for each customer who has moved and has provided a new address to the postal service – Flag an old address as no longer accurate when a person is no longer living at the address in the database **Address Validation** – Validate each US postal address against US postal standards – Provide zip+4 – Standardize address naming conventions **Geocoding (when connected to a Voter File platform)** – Provide a rooftop geocode for an address so that mapping and routing software can be used, including
As a CRM administrator I can enrich data on my Phone records so that I can better understand how to interact with them as supporters	**Likely Cell** – Flag a phone number as likely being a cell phone based on a third-party database of ported cell phone numbers

Use the CRM for Targeting and Analytics

Business Process 11: Reporting and Analyzing	
Organizations need a comprehensive look at their programs and data, including both online and offline supporter and donor activity to understand efficacy of their work, improve future endeavors and provide insights to stakeholders.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a user running and managing any type of program, I want to be able to get a detailed view of the key activities and data at a contact, group or overall level. Sample Roles: Executive Director, Director of Development, Event Manager, Director of Marketing, or Volunteer Manager	**Edit & View Grid Report Templates for Key Business Objects** – Default reports for key business objects associated to contacts across marketing channels, donations and contributions, event and volunteer activity, contact metadata and finance. – Create Custom Report Templates with filters and column configuration pre-set to share throughout your organization – View reports by segmented lists to see core metrics on a targeted audience – Group reports to compare and see overall trends – Export reports as CSVs, PDFs for off-of-platform analysis – Schedule reports to run on specified intervals
	Create & Edit Counts and Crosstabs for Subgroup Analysis – Pre-set demographic and metadata variables for analysis – Administrators can make additional variables available with limits – Used predominately for demographic voter analysis and survey response analysis
	Canned & Printable Reports for Core Business Details – Aggregated data for core business objects pre-formatted and print-ready as PDFs
As a user running and managing any type of program, I want to be able to visualize my data to help me better understand performance and key metrics and to produce materials for internal communication.	**Create and Edit Analytics Dashboards** – Create and edit custom dashboards with charts and graphs (Ex. Total contribution amount per month as a bar graph) – Pre-configured system dashboards aligned around core business needs (Advocacy, Email, Organizing etc.)
“As a Digital Marketing Manager, I need to understand my performance within a specific campaign (ex. Year-end giving, issue-based campaigns) and within a specific action type (ex. All contribution asks, all newsletters).”	**Categorize email and form submissions** – Query string assistant for tracking using UTM marketing and source code – Tag with forms source codes and campaign – Tag emails with Campaign and Ask Type
“As Digital Marketing Manager, to improve my program, I need longitudinal reporting across my	**Report on email performance**

forms, emails, and mobile messages.”	– Extensive metrics; open, click, conversion, total amount raised, average amount per contribution, hard and soft bounce, unsubscribes, SPAM complaints etc. – Audience segment level reporting with “Grouped Emails” – Opens caused by Apple’s Mail Protection Program are segmented to a separate “Machine Opens” count/rate – 30 day and 90 benchmarks stats – Segment-level breakout reporting per email (with Group Emails) – Reporting per-email recipient – Unsubscribe method reporting **Report on mobile messaging performance** – Extensive metrics; Click, conversion, total amount raised, average amount per contribution, hard and soft bounce, opt-outs, SPAM complaints etc. – 30 benchmarks stats – Reporting per-message recipient – Opt-in / Opt-out report **Report on online forms performance** – Extensive form level metrics; form views, count of conversions, donations and recurring donations, avg contribution amount, count of new contacts, etc. – Per-submission level reporting
As a Director of Development, I need insight into how my fundraising program is performing and want to be able to understand the organization's finances.	**Report on Contributions, Attributions and Soft Credits** – Contribution reports with detailed metrics – Number of donors, Total amount, Avg. Contribution Amount, Count of contributions etc. – Reports to track the long-term value of donors – Reports to provide insight into donor acquisition and ROI – Attribution and soft credit reports to see contributions made as part of Donor Advised Funds, Board Giving, or on behalf of another
	Report on General Ledger – Insight into settled contributions, cost centers, and specific funding apportioning

Business Process 12: Searching, Filtering and Segmenting

EveryAction provides a variety of ways for users to find and group Contacts for reporting and outreach efforts. Create dynamic or static lists based on hundreds of possible data points.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a user trying to build and maintain specific audiences or groups of contacts within my broader organization contacts, I need to be able to search across my contact base for records that meet various criteria and then save those results for continued reference, use and to share with others within the organization.	**Create a list** – UI that powers segmenting your audiences across hundreds of different data objects, without requiring knowledge of SQL

	– Can be stored as a static list of IDs (Saved Lists) or as query parameters that can rerun at any point (Saved Searches) – Can be shared within an organization (and across committees in a datashare) for others to use – Suppress contacts from results across all users – Preview results of the search to get a sense of whether search parameters are correct
As a user trying to navigate the day to day of managing my contacts, I want the ability to quickly locate an individual support or donor, whether to look up additional information, make a note or to edit existing information.	**Contact Search Bar (Omnisearch)** – Persistently available search bar in header – Seach contacts by first name and/or last name, email – Returns contact card with name, ID, partial address, and email **Quick Lookup (QLU)** – Field-based filtering on several common criteria associated to contacts – Filter based on: Name, ID, Address, Phone Number, or Email – Useful for when looking for a contact you only have partial information or if you suspect there are duplicate contacts – Merge duplicates or add new contacts directly from QLU page – Filters can be saved to always return a select group when landing on QLU (for example, everyone in a given city).

Automation

Business Process 13: Automate key business processes	
There are several organizational processes spanning our contact management, marketing and fundraising activities we have standardized and repeat on a regular basis that we want to automate to reduce costs and improve efficiency.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As an administrator, I want my staff to be able to setup repeatable actions that are automatically applied to our contacts to help us achieve our engagement, donor stewardship, fundraising, and advocacy goals and enabling our staff to focus on higher-value and higher-touch activities.	**Create/Edit Workflow Automations** – Automatically enroll contacts in Automation based on Saved Searches – Take actions on contacts as part of donor stewardship or volunteer management (Assign Staff, Schedule Follow Up) – Apply Activist Codes to tag and track contact attributes and interests based on specific criteria – Automatically analyze contacts as part of donor prospecting with WealthEngine – Send contacts down customized communication journeys through email or mobile messaging channels – Branch contacts based on available criteria in Create A List and on actions taken in previous steps of the Automation, such as opens, clicks, conversions

	– Wait for a number of days or until a specific day of the week to take subsequent actions – Pre-built templates for common workflows (10 available) – Built in data visualization to provide at-a-glance understanding of workflow performance
As an administrator, I need to be able to dynamically segment my audience into mutually exclusive groups to better target fundraising, advocacy and communication efforts.	**Create Custom Targets** – Nightly flag/bucket of a large audience based on a Saved Searches or List – Sub-groups allow for additional mutually exclusive segmentation within created Target universe – Contacts who meet Target criteria are more easily searchable in Create A List via Targets page section – For example, a Target of all Donors (anyone who have given) and then Subgroups of pre-defined donor levels that update nightly).

Process Payments

Business Process 14: Process Payments from Supporters	
Stable platform for handling all users donation processing needs. Can be used with multiple, popular payment gateways and allows multiple types of payments (credit, debit, EFT/ACH, Apple pay).	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a CRM administrator, I can establish one or more Designations for the contributions I collect	**Designations** – Create a Designation – Select which Payment Methods are allowed for a Designation – Select whether international currencies are allowed – Associate a Designation with a disclosure report – Create more than one Designation so that I can segregate 501c4 contributions from 501c3 contributions
As a CRM administrator, I can establish a relationship with a payment gateway to collect and administer incoming contributions for my organization	**Payment Providers** – Support for Paragon, PayPal, WorldPay and Stripe
As a CRM administrator, I can support my team in using a variety of payment methods	**Payment Methods (varies by provider)** – Credit and debit – EFT/ACH – Apple Pay
As a fundraiser, I manage recurring /sustaining contributions	**Recurring Commitments** – Start a commitment – Support different frequencies such as weekly, monthly, quarterly and yearly

	– Schedule the commitment so that it is automatically charged – Allow for an optional end date **Sustainer Migration** – Migrate sustainers from another platform onto EveryAction without requiring new payment methods from the support
As an fundraising director, I can make sure that fraud is not being conducted on my payment forms	**Fraud Prevention** – 3rd Party Fraud Detection (MaxMind) – CAPTCH's on suspicious Ips – Client optional CVV

Integrate the CRM with Other Tools

Business Process 15: Access Data Outside of the Supporter Database	
As a database user I can access all the data that is stored in my supporter database so that I fully leverage the data in integrations, reporting and analysis	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a data analyst I can access a replica of my database in a relational database format	**Use Pipeline Cloud for a near-real-time ETL of a client's database to a cloud-hosted database for the purpose of analytics, offline processing, and integrations.** – Continuous syncing from the transactional database to a reporting database – Add on capability which, by default, includes a hosted Azure SQL Server database for simple client setup – Optionally, client can self-host and the sync can Target AWS Postgres, AWS Redshift, Azure SQL Server (client-hosted), Google Postgres – Table structure optimized for a reporting database – Secure multi-factor authorization – Headless user accounts for programmatic access – Consultant access model allows for consultant and partners to build shared reporting and integration solutions across multiple clients.
As a non-technical database user, I can export sets of core domain data to an external file	**Use various Export systems to allow users to create select fields and export files for external use:** – Traditional Export system allows for Exports to be constrained to a set of search criteria when run through My List – Export Formats allow a user to predefine which fields to be included when exporting – Export Levels allow for assigning limits to sets of users which fields can be exported and the number of rows that a user is allowed to export.

	– Grid Reports include a separate export workflow for exporting from dozens of grid reports across all core objects. – Grid Report Exports can be exported to traditional text files (.txt, .csv) as well as can be exported directly to Google Sheets
As a database administrator needing access to automated exports from data across multiple tables, I can pay for a Custom Data Job to be created and scheduled.	**Create and use Custom Data Jobs** – Can include complex queries that grab data from multiple tables – Can evaluate data based on ad hoc sql where clauses – Can add aggregate columns – Can be scheduled – Deposited on a SFTP server which clients can automatically monitor and consume as part of an integration process Note: Custom Data Jobs are a workaround to the limitations of the user experience for creating exports in the web UI or through the API. Custom Data Jobs require clients to pay for custom Data Team hours to build a SQL query and schedule that query to be run and outputted on a regular basis.
As an API User, I can use the API to get all of the new or changed records since I last called this API endpoint.	**Use the Changed Entity Export (CEE) API to refer to an object and get all the new or changed records for rows of the object.** – CEE supports most core objects such as Contacts, Addresses, Email Addresses, Phones, Contributions, Recurring Contributions, Form Submissions and Activists Codes – CEE does not support some significant objects such as Events and Survey Questions and Survey Question Responses – CEE returns all or new or changed records by default, but can be filtered to a set of object IDs – CEE returns a Change Code on each row to indicate if the row was new, changed or deleted. Note: The CEE is a workaround for the lack of outbound Events or Webhooks and often requires integrators to create middleware processes to schedule calls and write business logic to map to an external target.

Business Process 16: Integrate my supporter database with other tools and processes	
A suite of APIs and integration types that allow users to interact with their data and integrate with other platforms.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a programmer, I can access a public API to support my organization or build integrations	**REST Public API** – Can add, update and delete core domain objects via the API, including Contacts, Events, ContactHistory, Activist Codes, Survey Questions, Notes and **Bulk API** – Can bulk add and update core domain objects in bulk in order **Changed Entity API**

	– Can receive a set of changed records for core domain objects so that I can integrate EveryAction data with other systems
As a Bonterra supporter staff, I can gate access to clients and integrators so they get access to the API methods they should have access to	**Integration Types** – Can create an Integration Type that consists of a set of Security Functions – Can create an API key based on the Integration Type so that the API key can be used to provide access to only the required Security Functions necessary for the integration – Add a SF to an existing Integration Type and make sure all existing API Users and Keys have access to that Security Function – Remove a SF to an existing Integration Type and make sure all existing API Users and Keys lose access to that Security Function
As a platform administrator, I can give access to users to use the API	**API Access to Clients** – Publish an API Integration so that an API Integration Type can be requested by users of a Committee – Un-publish an API Integration Type so that users of a committee no longer have access to the API keys associated with that integration type
As a platform administrator, I can manage the API keys that give access	**API Key Provisioning** – User can request an API for a specific integration – Administrator can approve a requested API for a specific integration – Administrator can revoke or expire an existing API key

Engage with Supporters

Business Process 17: Design Forms, Emails, and Mobile Messages	
Easily create web forms, emails, and SMS/MMS messages that match your brand, look good on any device, and resonate with your supporters.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
"As a digital marketer without a wealth of technical resources, I need my emails and forms to look professional and match my existing digital brand – without me having to code HTML, JS, and CSS." "As a Web Content Manager, my organization has very specific online needs. I need source code access when editing my emails and forms and I don't want editing software to mung my code."	**Create "No code" customizable forms and email** – Drag and drop email editor with cross-inbox styling compatibility built-in – Customize form design elements through UI – Save and reuse content and images **Edit Source Code** – Source code editing for both forms and email **Choose between different mobile message formats** – SMS vs. MMS messaging options – Upload images – Built-in link shortener

"As a Digital Fundraiser, I know personalization is key to persuasion. I need my form, email, and SMS content to be reflective of the supporter receiving the message."	**Persuade with personalization** – Hundreds of contact merge fields available for insertion into emails and mobile messaging – Create conditionalized content in emails – Set/get variables within emails
"As the Digital Marketer, I need users to trust that my hosted forms and webpages are properties that belong to my organization – and are not some phishing attempts."	**Manage your brand** – Vanity Domains for forms – Short codes and keywords for mobile messages – Customizable unsubscribe pages – Embed forms directly into your own web site – Build static web pages for additional content
"As a Digital Marketer, before sending an email or publishing a form, I need to make sure my design and content look and work as expected."	**Preview & Send Sample for forms, emails, and mobile messages** – Preview and send sample emails and mobile messages o Option to select a contact to o Test merge data in emails and mobile messages o Test conditional in emails – Form preview w/ data population
"As a Digital Marketer, I need to test my content to ensure I am sending the most persuasive message."	**Optimize your communications** – Find the most engaging message with multivariate testing in email and a/b testing in mobile messaging. – Schedule and automatically send the 'winner' of content tests based on user-selected winning criteria
As a Digital Marketer, I want to message supporters' phones when appropriate – and avoid waking up my West Coast supporters at 6 a.m.	**Send mobile messages by time zone** – When scheduling a mobile message campaign, users can opt to have the message sent at the correct time for each time zone

Business Process 18: Target supporters for outreach

Users can create complex audiences, filtering on all the different facets of data stored in the EveryAction CRM. Audiences can be static lists of IDs or dynamic parameters updated at send-time for the most up-to-date audience information.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a Digital Marketer, I might have several audiences I need to include or suppress and want an easy way to manage those in one mailing	**Target emails and mobile messages by combine audiences for inclusion & exclusion** – Pick multiple saved lists or a single saved search as your inclusion audience, and then pick multiple saved lists or a single saved search as a suppression audience, allowing for audiences to be built like Lego blocks

As a Digital Marketer, I need to manage the mailings I send for optimal deliverability	**Filter out disengaged recipients (email scoring)** – Suppress email recipients based on engagement history, for entire target audience or by email address provider (Gmail, AOL, Hotmail, etc.)
As a Digital Marketer, I want to message supporters' phones when appropriate – and avoid waking up my West Coast supporters at 6 a.m.	**Send mobile messages by time zone** – When scheduling a mobile message campaign, users can opt to have the message sent at the correct time for each time zone

Business Process 19: Raise More Money

Organizations need to build a sustainable fundraising strategy that can support the organization's mission long-term and that often means exploring various fundraising methods such as grants, events, online and offline campaigns, and major donor solicitation to reduce dependency on a single source.

Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a Digital Fundraiser, I'm looking to have the best conversion rate on my forms, while also making sure that I'm raising the most amount of money in each of my transactions. I have a strong preference for recurring revenue, as that is how my organization builds our budgets.	**Collect online donations** – Contribution and ticketed event forms – Upsell one-time donors to recurring donations through upsell lightboxes – Auto-fill of supporter contact (ActionProfile) – 1-click donating with saved credit card information (FastAction) – Maximize donations by presenting supporters with the ideal contribution ask amount using Optimized Ask and Smartlinks in both emails and mobile messaging – Leverage your supporters to raise money on your behalf with peer-to-peer fundraising
As a development professional, I need a way to sell tickets and manage my ticketed events.	**Raise money through ticketed events** Users can create a Ticketed Event which can then be associated with an Online Actions event form to make it easier for attendees to sign up and pay for their tickets.
As a nonprofit fundraiser, I want run multiple direct mail or telemarketing campaigns throughout the year to acquire new donors and engage existing supporters	**Create and manage direct response efforts** Direct Response Plans are created by organizations to elicit an immediate response from their targets with the goal of quickly generating leads or donations. Our Direct Response Plans include Digital Ads, Direct Mail – Housefile and Acquisition, Telemarketing, and Multichannel plans. Capabilities include: – Segmentation; for non-acquisition plans, leverage CAL to build audience segments based on various criteria, such as donation history, demographics, or previous engagement levels – Package creation (sub-segmentation) – Cost estimation – Reporting; track response rate and donations from each mailing to assess the effectiveness of the campaign – Leveraging source codes and campaigns to integrate direct response campaigns with other marketing channels to create a cohesive and multi-channel donor engagement experience

	– Upload finder files and associate them with an Acquisition plan to save time and money when keying data for new donors acquired via direct mail
As a non-profit fundraiser, I want to talk to prospective donors, supporter, or volunteers on the phones	**Raise money through phone banking** – Virtual Phone Bank: call potential supporters, volunteers, or members. VPB is exponentially configurable and allows organizers to configure what numbers are called, what data points are exposed to callers, which fields are editable, and integrates with other functionality such as the events scheduler and contributions fields – OpenVPB: call potential donors. OpenVPB is exponentially configurable and allows organizers to configure what numbers are called, what data points are exposed to callers, which fields are editable, and integrates with other functionality such as the events scheduler. Key differentiator is it does not require a CRM user account to make calls. – VPBConnect: VPBConnect is a click-to-call tool layered on top of OpenVPB. Allows callers to make calls through VOIP. Has all the functionality of OpenVPB – Robo Surveys Robo Calls: Allows organizations to phone survey without caller capacity (Robo survey). Allows for automated phone messages about an event or an action from a celebrity or other trusted messenger (Robo Calls)
As a non-profit fundraiser, I want to talk to prospective, donors on in person	**Raise money through door-knocking and high traffic street canvassing** MiniVAN Contributions: – Integrates with our online actions contribution forms allowing canvassers to collect contributions in person. Uses a scan credit card functionality. Can report on how much money was raised via canvassing Optimized Routing: Create smart routes on MiniVAN to minimize time between houses for canvassers. – Turf Cutter: Create lists of target households for staff/volunteers to contact door-to-door based on a map – MiniVAN: Mobile app that staff/volunteers can use to manage walk lists (lists of households/people) talk to potential supporters/donors/members/ at their home or workplace and record the results of those conversations – Paper Canvassing / Report Formats: paper walk lists that staff/volunteers can use to manage walk lists (lists of households/people), talk to potential supporters/donors/members/ at their home or workplace, and record the results of those conversations – Distributed Canvassing: use minivan to auto-cut lists of people to talk to based on geography for canvassing without using turf cutter – Street Team: Allows canvassing without needing a list of people to start. For example, soliciting donations from passerbys at a festival, or doing supporter outreach at a farmers' market. – MiniVAN commit page: Allows database admins to review canvassing data before applying it to the system. Particularly useful for paid canvassing programs where data review is an important part of the progress
As a membership manager, I want to easily acquire, renew, upgrade, and steward our members, track expiration dates and benefits, and segment communications based	**Set up an automated membership program** – Establish a set of financial-based criteria that automatically assigns new memberships and renewals on nightly basis – View current or most recent membership status, full membership history, and summary details (e.g., times renewed) on a contact record

on a donor's membership status and level of engagement.	– Leverage saved searches, automation, and TGE to send renewal reminders to soon-to-expire members and re-engage lapsed donors
As a Major Gifts Officer, I want to track the various stages of engagement and giving for major gift solicitations, from initial contact to closing the gift. As a Major Gifts Officer, I want access to giving history, communication notes, and important donor milestones, so I can send personalized messages to strengthen donor relationships. As a Major Gifts Officer, I want to segment donors based on giving preferences and engagement levels, so I can tailor my outreach and solicitations accordingly.	**Create Moves Management Action Plans** Users can set up one or multiple moves management action plans on a contact record to track the journey of a major gift solicitation through its various stages (Identification, Qualification, Cultivation, Solicitation, Negotiation, Closed). Within each plan, users can: – Note primary and secondary solicitors for easy portfolio management – Add ask details and projections – Link notes, contact history, and follow ups – Run wealth screenings via our WealthEngine integration – Assign campaigns and link pledges once a gift is secured and
As a Major Gifts Officer (MGO), I want to identify prospects who have the capacity and inclination to make high-value contributions. As a Major Gifts Officer, I want to have easy access to my portfolio so I can see who needs immediate attention, update statuses and know how I'm performing.	**Major Giving Portfolio** A page that serves as a workspace for major giving team members to view and interact with donor records in their portfolio, action plans, and potential prospects. – Highlights contacts in an MGO's portfolio in order of priority need for attention for reasons including pledges due, follow ups, birthdays, membership expiration, etc. – View interesting contacts (based on saved search criteria) to request prospect research or claim as Assigned Staff – Overview of KPIs (key performance indicators) for portfolio and action plans (30-day and FYTD) **Screen contacts via WealthEngine integration** – Clients with a subscription to WealthEngine can connect their account to EveryAction and run wealth screenings in bulk or for a single contact. Data points like P2G score (propensity to give), gift capacity range, net worth, total assets, and more are appended to the contact record and can be used for further segmentation and targeting.
As a Grants Manager, I want to record details of grant proposals from the research phase until the end of funding so that I can have a complete and reportable view of the effort and actions required.	**Create grant plans** – Easily track the lifecycle of grant via status updates – View/add/edit grant deliverables and associated deadlines – Link and schedule follow ups – Attach copies of all grant-related documents – Review probability calculations based on status – View and manage relationships with individual staff (e.g., program officers) to facilitate follow ups and communication

As a Grants Manager, I want to track follow-ups and grant deliverables associated with a grant to ensure we meet our grant requirements and conditions. As a Grants Manager, I want to project the likely award amount so I can report on likely revenue and cash flow.	
As a Planned Giving Officer (PGO), I want to identify and cultivate relationships with individuals interested in making planned gifts through bequests, trusts, or other estate planning. As a PGO, I want to record information about marketing, cultivation, and stewardship of Planned Gifts so I can report on activities, plan strategy, and have accurate reporting on PG efforts and revenue. As a PGO, I want to know which contacts are related to the PG contact to track and steward these gifts effectively.	**Create Planned Giving Plans** PG plans are used to manage cultivation strategy with PG prospects, track when donors pro-actively request information about PG in response to another effort, and record distinct types of PG gifts (Bequests, Trusts, Charitable Gift Annuity, etc.). Users can: – Set a designated Planned Giving Contact (e.g., estate planner) – Record PG Type (e.g., Bequest) and committed amounts – See vital stats like date of birth, age deceased status, and date of death – Create follow ups, contact history, notes, etc. to keep track of cultivation history

Business Process 20: Engage Supporters in Your Mission	
Leverage EveryAction tools in order to capture the greatest number of supporters and engage them to give their time, voices, and expertise.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a Digital Campaigner, I want to create opportunities for new people to join my organization, as well as offer existing supporters opportunities to reengage, deepening their relationship with my cause.	**Generate leads and grow your supporter list** – Form types to drive lead generation and list growth, sign up, volunteer, petition, free events, and story form types – Mobile messaging ‘short codes’ to speed mobile messaging opt-in – Record who shares your actions on social media, see who they refer in, and track relationships – Manage Facebook custom ad audiences for purposes of remarketing, suppressing, or lookalike ad campaigns

	– Avoid paying for already captured leads when running acquisition campaigns by generating email address hashfiles – data collection through customizable ‘questions’ which can be mapped to: o activist codes o survey questions o contact notes o custom fields on the contact or contribution level – Respond to supporters with mobile messaging inbox and one-to-one communication – Customize metadata for all form submissions to capture parameters like UTM codes or URL referrer.
As a non-profit organizer/fundraiser or union organizer I need to be able to schedule and plan events. To plan a successful event, I need to be able to invite attendees, know who is coming, and know who attended events. I need a suite of tools to manage events, and want the event functionality to work across other outreach tools	**Coordinate events** – Event Management: Create and edit events in the CRM, including date, time, and location information. Includes the ability to specify event roles and event types if necessary – Event scheduler: schedule contacts to attend events, assign event roles if necessary – Zoom Events Integration – Ticketed Events: create events that have set number of tickets, allow guests to purchase or reserve tickets via online forms – Supporter Groups: manage group event attendance – Attendee Event Check-in Page: Allow event attendees / event managers to self-check in to events without needing to sign into the CRM – Supporter Created Events: Allow supporters to host events for you, after going through an approval process
As a non-profit or union organizer, I want to talk to prospective supporters, donors, and members on the phone and record the results of those conversations	**Organize phone banking and phone outreach** – Virtual Phone Bank: call potential supporters, volunteers, or members. VPB is exponentially configurable and allows organizers to configure what numbers are called, what data points are exposed to callers, which fields are editable, and integrates with other functionality such as the events scheduler. – OpenVPB: call potential supporters, volunteers, or members. OpenVPB is exponentially configurable and allows organizers to configure what numbers are called, what data points are exposed to callers, which fields are editable, and integrates with other functionality such as the events scheduler. Key differentiator is it does not require a CRM user account to make calls. – VPBConnect: VPBConnect is a click-to-call tool layered on top of OpenVPB. Allows callers to make calls through VOIP. Has all of the functionality of OpenVPB – Robo Surveys Robo Calls: Allows organizations to phone survey without caller capacity (Robo survey) . Allows for automated phone messages about an event or an action from a celebrity or other trusted messenger (Robo Calls)
As a non-profit or union organizer, I want to talk to prospective supporters, donors, and members at their home or workplace and record the results of those conversations	**Organize canvassing and door knocking** – Turf Cutter: Create lists of target households for staff/volunteers to contact door-to-door based on a map – MiniVAN: Mobile app that staff/volunteers can use to manage walk lists (lists of households/people) talk to potential supporters/donors/members/ at their home or workplace and record the results of those conversations – Optimized Routing: Create smart routes on MiniVAN to minimize time between houses for canvassers.

	– Paper Canvassing / Report Formats: paper walk lists that staff/volunteers can use to manage walk lists (lists of households/people) talk to potential supporters/donors/members/ at their home or workplace and record the results of those conversations – Distributed Canvassing: use minivan to auto-cut lists of people to talk to based on geography for canvassing without using turf cutter – Street Team: Allows canvassing without needing a list of people to start. For example, soliciting donations from passerbys at a festival, or doing supporter outreach at a farmers market. – MiniVAN commit page: Allows database admins to review canvassing data before applying it to the system. Particularly useful for paid canvassing programs where data review is an important part of the progress
As a union organizer, I want to organizer workers to form a union at their workplace or join an existing union at their workplace. I need to collect Authorization and Membership Cards in order for workers to unionize.	**Organize workers to form or join a union** – Help workers form a new union by collecting Authorization Cards – Help workers join an existing union by collecting Membership Card – Have a PDF Card to use in place of a paper card to be used for authorization card counts, and membership validation – Reporting on who has signed cards – Know who has signed an Authorization or Membership card by looking at an individual's contact record. – As a union organizer I'll also need information about a person's job, workplace, and union eligibility and membership status so that I can have the most effective conversation with them. Many people have multiple jobs so I'll want to see information on all of their jobs. (Union Jobs model)
As a non-profit or union organizer, I want to talk to prospective supporters, donors, and members by mail/paper	**Generate Labels and Letters** – Generate letters and associated mailing labels for a list of people within the CRM.
As a non-profit or union organizer I want to collect stories from my supporters that can help my mission, such as collecting success stories from supporters that could be used in a fundraising drive, or collecting stories from workers that could be used in a unionization movement	**Collect, vet, and use supporter stories** – Intake stories from supporters – Intake stories from supporters seamlessly via online forms (supporters can submit their own stories via an online form) – Collect contact information about a supporter so I can follow up on the story – Vet and approve stories for use in materials like fundraising or organizing campaigns – Attach files and links to stories – Assign stories to staff members for follow up and approval – Report and analyze story data and meta data (tags, follow ups, etc.)
As a Digital Campaigner, I want to give an easy onramp for my supporters to contact their public officials to share their thoughts on important matters that my organization works on.	**Advocate for positive change in the world** – Target messages to public officials at the federal, state, local levels – Make official regulatory comments and send public interest messages to prominent figures like CEOs or university presidents through our custom advocacy targets. – Messages can be delivered via API, contact forms, email, fax, as well as via Twitter or patch through calling campaigns, known as click-to-call – Different messages for different targets, allowing supporters to 'thank' some targets, while indicating frustration with others.

	– Advocacy targets filterable by office, committee they sit on, party, geography, and title
As a Digital Campaigner, I want to make the most of the time when a supporter is paying attention to my organization, and make as many tools available to my supporters so they can complete substantive actions without waiting for someone at my organization to get back to them.	**Empower your supporters** – Supporters can create self-host events on behalf of an organization, with admin review and approval workflows. – Attendee check-in pages for attendance tracking. – Supporters can manage their contact information and recurring donations through secure "Self-Service Portals"

Business Process 21: Acknowledge Donors & Supporters	
Sending contribution acknowledgements is a common way to express gratitude, encourage continued support, and foster positive donor relationships. Separately, issuing timely and accurate end-of-year tax receipts is a legal requirement set forth by the Internal Revenue Service (IRS) and helps ensure that organizations maintain its tax-exempt status, while helping donors substantiate their charitable contributions when filing their annual tax receipts.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
As a nonprofit fundraiser, I want to generate and send contribution acknowledgements and other personalized form letters to donors and supporters.	**Mail Merge Templates** – Can upload new custom templates or edit pre-existing saved templates – Generate letters in bulk via Contribution Acknowledgement Report or Contact Records report – Generate one-off letters directly from the contact record **Digital acknowledgements** – Display 'thank you message' page with donation details upon form submission with prompt for user to download – Set up a confirmation email to automatically go out upon form submission (in addition to the thank you page) – Email one-off receipts directly from the contact record
As a nonprofit fundraiser, I want to send a year-end tax receipt to all our donors that includes all contributions made throughout the year, the total donated amount, and the total tax-deductible amount so, they can meet tax filing deadlines and accurately report their charitable contributions.	**Send year-end tax receipts** – Quickly merge a list of last year's donations into an email using a merge field; target and send email via TGE – Send one-off receipts to individual donors directly from the contact record

Appendix

Business Process 23: Digital Marketing Specific Use Cases	
Monitor performance and gather insight with extensive reporting and categorization options.	
Use Case(s) *How users will perform tasks to achieve their goal*	**Capability** *The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.*
"As a Digital Marketing Manager, I need to understand my performance within a specific campaign (ex. Year-end giving, issue-based campaigns) and within a specific action type (ex. All contribution asks, all newsletters)."	**Categorize email and form submissions** - Query string assistant for tracking using UTM marketing and source code - Tag with forms source codes and campaign - Tag emails with Campaign and Ask Type
"As Digital Marketing Manager, to improve my program, I need longitudinal reporting across my forms, emails, and mobile messages."	**Report on email performance** - Extensive metrics; open, click, conversion, ttl amount raised, avg amount per contribution, hard and soft bounce, unsubscribes, SPAM complaints etc. - Audience segment level reporting with "Grouped Emails" - Opens caused by Apple's Mail Protection Program are segmented to a separate "Machine Opens" count/rate - 30 day and 90 benchmarks stats - Segment-level breakout reporting per email (with Group Emails) - Reporting per-email recipient - Unsubscribe method reporting **Report on mobile messaging performance** - Extensive metrics; Click, conversion, ttl amount raised, avg amount per contribution, hard and soft bounce, opt-outs, SPAM complaints etc. - 30 benchmarks stats - Reporting per-message recipient - Opt-in / Opt-out report **Report on online forms performance** - Extensive form level metrics; form views, count of conversions, donations, and recurring donations, avg contribution amount, count of new contacts, etc. - Per-submission level reporting
As a Digital Marketer, I might have several audiences I need to include or suppress and want an easy way to manage those in one mailing	**Target emails and mobile messages by combine audiences for inclusion & exclusion** - Pick multiple saved lists or a single saved search as your inclusion audience, and then pick multiple saved lists or a single saved search as a suppression audience, allowing for audiences to be built like lego blocks
As a Digital Marketer, I need to manage the mailings I send for optimal deliverability	**Filter out disengaged recipients (email scoring)** - Suppress email recipients based on engagement history, for entire target audience or by email address provider (Gmail, AOL, Hotmail, etc.)
As a Digital Marketer, I need to manage the mailings I send for optimal deliverability	

While most of our reporting is table stakes, we are one of the few providers that segment out opens caused by Apple's Mail Privacy Protection program. This Mail app feature can easily inflate open rates by 30%-40%. Segmenting these "machine opens" out provides a more reliable open rate. This is especially helpful for accurate A/B subject line tests.