

# Bonterra Fundraising and Engagement Solutions

## Ongoing Services Description

### Introduction

Welcome to Bonterra Fundraising and Engagement – the revolutionary platform designed to transform supporter interactions into one seamless, unified experience. In a landscape where supporter engagement has faltered due to fragmented experiences across multiple tools and channels, our solution redefines engagement dynamics by offering a singular, unified supporter experience.

Below is an overview of all the Fundraising and Engagement solutions offered by Bonterra.

## Fundraising and Engagement Enterprise

### Introduction

F&E Enterprise combines our unified set of fundraising and engagement tools with the transformative power of AI, Enterprise-level data management capabilities.

### Capabilities

**Engagement:** Customers will leverage our engagement capabilities to manage all their one-to-many marketing and advertising fundraising programs in order to engage more donors, volunteers and advocate. This part of our service includes but is not limited to:

- **Targeted Email:** Run a smarter, integrated email program using our easy-to-use visual editor, powerful A/B multivariate testing tool, one-click donations, and advocacy actions.
- **Online Action Forms:** Enable monetary and non-monetary contributions, fostering volunteerism, financial support and advocacy seamlessly. Leverage a variety of form types (Recurring donations, tribute donations, one-time donations, advocacy, peer-to-

peer, story collection and more). Track form performance (Views, Conversion Rates, Submission Rates and more).

- **FastAction:** Enable supporters to save their profile and payment information for faster giving, volunteering and advocacy actions later. Additionally, experience higher conversion rates when any one of Bonterra’s 20M+ profiled supporters engages with you.
- **Supporter Groups:** organize your supporters into the right groups to drive more effective messaging, campaigns, events and more.
- **Dedicated Tollfree Number:** Offer direct, accessible support to supporters.
- **SMS (text messages):** augment your existing communications in order to reach supporters instantly and maximize engagement. Our Mobile Messaging product is integrated with the rest of the platform, so your organization can easily create, track, and analyze your campaigns all in one place.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS communications. The details of those limits and fees will appear in customer contracts.*
- **MMS (Pictures, Video, Audio):** Incorporate images, gifs, videos, contact cards, etc. Into your mobile messaging.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS and MMS communications. The details of those limits and fees will appear in customer contracts.*
- **Keywords:** Create custom keywords to engage with supporters and grow your opt-in list. Use keywords to automate responding with links to your forms, for text to donate, or to text to sign up.
- **Automation & Scheduling:** Streamline processes with automated actions and scheduling.
- **Advocacy Tools:** Create an advocacy form and configure the advocacy step to ask supporters to contact their elected officials and custom targets in support of a particular cause, policy or bill.
- **Inbox & 1:1 Communication:** Manage an inbox and facilitate direct, personalized communication to your supporter base.
- **Full API Access:** Harness the full potential of the platform through API integration capabilities.
- **(Pro and Enterprise Only) VPB Connect (Virtual Phone Bank Connect):** leverage an “autodialer” tool that allows volunteers/staff to make calls, record information, and attempt to connect a caller to the next person automatically.
  - *Note: customer subscriptions will include usage limits and usage fees related to VPB Connect. The details of those limits and fees will appear in customer contracts.*
- **(Pro and Enterprise Only) Canvassing:** Leverage a 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.
- **(Pro and Enterprise Only) Canvasser Tracking and Reports:** View and track progress of canvassers on a map, get stats of contact and contributions collected, and download a report with more granular daily-canvasser data.

- **(Pro and Enterprise Only) RoboSurveys and RoboCalls:** Use automated phone messages to make calls or conduct surveys without caller capacity.
- **(Pro and Enterprise Only) Optimized Ask AI Model:** Activate a recommendation model that creates supporter-specific donation recommendations that dramatically increase revenue per donor.
- **(Enterprise Only) Advanced Organizing:** Manage teams, unions, volunteers and staging locations for your advanced organizing efforts.
- **(Enterprise Only) Use-case specific AI models:** Activate a growing number of use-case specific AI models, including:
  - Retain supporters
  - Reactivate lapsed supporters
  - Target upgrades
  - Identify planned givers
  - Uncover potential sustainers

**Volunteer Management:** Customers will leverage our volunteer management capabilities to plan volunteer activities, manage volunteer events and cultivate volunteer relationships. This part of our service includes but is not limited to:

- **In-person and virtual event management:** recruit volunteers, manage check-in and track attendance for in-person and virtual events.
- **Real-time event data:** React in real-time using live data that tracks how your event is progressing.
- **Post-event feedback:** use email or text surveys to continually learn how you can optimize the volunteer experience.
- **Email and mobile messaging:** create a personalized and engaging volunteer experience before, during and after volunteer events.
- **Supporter-created events:** Empower your supporters to create events that advance your cause, all with straightforward approval processes and permission levels.
- **Social Sharing Capabilities:** Enable your supporters to engage their network
- **Feed, newsletter and suggestions:** Help existing supporters find the best next action to take .
- **Full API access:** Harness the full potential of the platform through API integration capabilities.
- **(Pro and Enterprise Only) Volunteer management dashboard:** visualize the important metrics and glean the insights you need to advance your program.
- **(Pro and Enterprise Only) Integrated with Nonprofit CRM:** deliver one unified experience for donors and volunteers by using the same backend between your volunteer efforts and fundraising efforts.
- **(Enterprise Only) SQL Mirroring:** get deep access to the data you need for enterprise-grade reporting and analytics.

**Giving Days:** Customers will leverage both our giving day technology as well as our professional services team to execute giving days that include, but are not limited to, the following capabilities:

- **Leaderboards:** Foster competition and motivation among your participating groups and fundraisers.
- **Campaign Tiles:** Show off participating groups on your main landing page with branded tiles showcasing the total dollars raised and unique donors or total gifts.
- **Gift Heat Map:** Include a gift heat map on your homepage to show everyone how far reaching your supporters are.
- **Livestream:** Host a virtual party on YouTube Live and embed it right on your homepage.
- **Text-to-Give:** Enable easy donation through text messages.
- **Peer-To-Peer Fundraising:** Empower supporters to fundraise on your behalf.
- **Full API access:** Harness the full potential of the platform through API integration capabilities.

**Events and Auctions:** Customers will leverage our events and auction technology to manage and optimize their supporter experience for ticketed events and online auctions. This part of our service includes but is not limited to:

- **Event Configuration:** manage all the details of your event, including: registration, ticketing, RSVPs, check-in functionality, promo codes and discount codes.
- **Event Livestream Video & Attendee Chat:** Engage attendees through live video and chat interactions during events.
- **Event Sponsorships:** Expand your reach with sponsor solicitation and management.
- **Multiple Auction Types:** Run a silent, live or fixed price auction depending on the needs of your organization.
- **Auction Configuration:** Manage all the details of your auction including: start and end times, item images, starting bid amounts, minimum bid increments, buy it now prices, and more.
- **Auction Communication Management:** Set automatic email notifications to indicate when auctions have started and ended, as well as to follow up with attendees who made commitments to pay.
- **Full API Access:** Integrate event and auction functionalities seamlessly.

**Nonprofit CRM:** Customers will leverage our nonprofit customer relationship management technology as the source of truth for all their interactions with their supporters. This part of our service includes but is not limited to:

- **Workflow Automation:** Create/edit workflow automations such as automatically enrolling contacts, assigning staff, scheduling follow ups, analyzing contacts, applying Activist Codes to tag and track contact attributes, and send contacts down customized communication journeys.
- **Duplicate Management:** Search for possible duplicates, view two possible duplicates side-by-side to confirm, merge two duplicate records. Receive a Duplicate Analysis Report (DAR) and bulk merge duplicates that you confirm.

- **Monetary Online Actions:** Access to Contribution forms for accepting donations (Recurring/Tribute/One-time), enabling email confirmation, and creating a sharing option.
- **Engagement Points:** Create a currency of engagement by assigning points to activities participated in so that the work a supporter does on behalf of an organization can be measured quantitatively.
- **Biographies:** log and manage the details of your supporters' biographic and demographic information to improve personalization.
- **Contribution Acknowledgement:** generate and send contribution acknowledgement using new custom templates or pre-existing saved templates. Display a 'thank you message' page with donation details upon form submission with prompt for user to download.
- **Custom Contribution Fields:** Create a custom field group to associate related fields together. Create a custom field and assign a data type of text, long text/note, lookup field, date, numeric.
- **CRM Reporting:** Access to a variety of different reports such as contribution, contact history, survey response, engagement points, and more.
- **Email to Notes:** Push the text of your Outlook, Gmail, or other email communications with your supporter automatically into their F&E contact record.
- **Financial Batch:** Group contributions together and assign them to a batch for reconciling banking statements and ensure that information is not changed once checks have been deposited.
- **Financial Households:** Let users create custom households to account for individual donors who contribute money together.
- **General Ledger:** organize all your financial transactions.
- **Giving History:** See the whole picture of your contact's data and track their giving journey.
- **Mail Merge:** With an integrated Mail Merge tool, you can easily create a mail merge template within F&E and generate thank-you letters using any report columns as merge fields.
- **Pledges:** Track pledges, document pledge agreements, establish timelines, and monitor your pledge fulfillment rate year over year.
- **Revenue Streams:** Track all different sources of revenue so that inbound contributions can be attributed to a revenue stream when posted to the general ledger.
- **Split Gifts:** Allows for the attribution to be split by amount or percentage when more than one person is responsible for the contribution.
- **Compliance:** Easily generate state disclosure or compliance reports.
- **(Pro and Enterprise Only) Assigned Staff:** assign staff action steps to ensure timely communication with every funder.
- **(Pro and Enterprise Only) Grants:** Utilize modern, state-of-the-art workflows to identify and research prospective funder and track deadlines and documents throughout the grant lifecycle.
- **(Pro and Enterprise Only) Membership:** Effectively manage your unique member program with customizable membership levels, terms, and hierarchies. Set rules to easily identify member opportunities and track upgrades. Automate communications to

welcome, renew, and recapture members at the right time, every time. Allow members to renew and upgrade their membership, update contact information, and more with customizable, branded self-service pages.

- **(Pro and Enterprise Only) Moves Management & Planned Giving:** Plan, track, and analyze the process of cultivating major donors. Identify prospective donors, segment based on their potential value and donor profile, automate best practices for nurturing prospects and analyze results. Track manage bequests and other donor planned gifts all within your donor database.
- **(Pro and Enterprise Only) Targets:** Dynamically segment your audience into mutually exclusive groups to better target fundraising, advocacy, and communication efforts.
- **(Pro and Enterprise Only) Custom Calculated Fields:** Custom data field that allows you to enter or calculate data for your specific need.
- **(Enterprise Only) Data Pipeline:** get access to an in-house data replication solution to enable direct access to your raw data to run ad hoc SQL queries, connect with business intelligence software, or develop custom integrations.
- **(Enterprise Only) SSO:** Allows you to use your existing OAuth 2.0 Compatible IDP to manage the username and password for those logging into Bonterra F&E.
- **(Enterprise Only) Direct Response Plans:** Create direct response plans to elicit an immediate response from targets with the goal of quickly generating leads or donations. Capabilities include segmentation, package creation (sub-segmentation), cost estimation, reporting, source codes and campaigns for integration with other marketing channels.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Fundraising and Engagement Pro

### Introduction

F&E Pro offers an integrated suite of fundraising and engagement tools that enables social good organizations to intelligently optimize the supporter experience across use cases.

### Capabilities

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- **Targeted Email:** Run a smarter, integrated email program using our easy-to-use visual editor, powerful A/B multivariate testing tool, one-click donations, and advocacy actions.
- **Online Action Forms:** Enable monetary and non-monetary contributions, fostering volunteerism, financial support and advocacy seamlessly. Leverage a variety of form types (Recurring donations, tribute donations, one-time donations, advocacy, peer-to-peer, story collection and more). Track form performance (Views, Conversion Rates, Submission Rates and more).
- **FastAction:** Enable supporters to save their profile and payment information for faster giving, volunteering and advocacy actions later. Additionally, experience higher conversion rates when any one of Bonterra's 20M+ profiled supporters engages with you.
- **Supporter Groups:** organize your supporters into the right groups to drive more effective messaging, campaigns, events and more.
- **Dedicated Tollfree Number:** Offer direct, accessible support to supporters.
- **SMS (text messages):** augment your existing communications in order to reach supporters instantly and maximize engagement. Our Mobile Messaging product is integrated with the rest of the platform, so your organization can easily create, track, and analyze your campaigns all in one place.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS communications. The details of those limits and fees will appear in customer contracts.*
- **MMS (Pictures, Video, Audio):** Incorporate images, gifs, videos, contact cards, etc. Into your mobile messaging.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS and MMS communications. The details of those limits and fees will appear in customer contracts.*
- **Keywords:** Create custom keywords to engage with supporters and grow your opt-in list. Use keywords to automate responding with links to your forms, for text to donate, or to text to sign up.
- **Automation & Scheduling:** Streamline processes with automated actions and scheduling.
- **Advocacy Tools:** Create an advocacy form and configure the advocacy step to ask supporters to contact their elected officials and custom targets in support of a particular cause, policy or bill.
- **Inbox & 1:1 Communication:** Manage an inbox and facilitate direct, personalized communication to your supporter base.
- **Full API Access:** Harness the full potential of the platform through API integration capabilities.
- **(Pro and Enterprise Only) VPB Connect (Virtual Phone Bank Connect):** leverage an "autodialer" tool that allows volunteers/staff to make calls, record information, and attempt to connect a caller to the next person automatically.
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- **(Pro and Enterprise Only) Integrated with Nonprofit CRM:** deliver one unified experience for donors and volunteers by using the same backend between your volunteer efforts and fundraising efforts.

**Giving Days:** Customers will leverage both our giving day technology as well as our professional services team to execute giving days that include, but are not limited to, the following capabilities:

- **Leaderboards:** Foster competition and motivation among your participating groups and fundraisers.



- **Dedicated Showcases:** Show off participating groups on your main landing page with branded tiles showcasing the total dollars raised and unique donors or total gifts.
- **Landing Page Enhancements:** include unique enhancements such as gift heat maps and confetti celebrations on your homepage to engage more supporters.
- **Livestream:** Host a virtual party on YouTube Live and embed it right on your homepage.
- **Text-to-Give:** Enable easy donation through text messages.
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- **Contribution Acknowledgement:** generate and send contribution acknowledgement using new custom templates or pre-existing saved templates. Display a 'thank you message' page with donation details upon form submission with prompt for user to download.
- **Custom Contribution Fields:** Create a custom field group to associate related fields together. Create a custom field and assign a data type of text, long text/note, lookup field, date, numeric.
- **CRM Reporting:** Access to a variety of different reports such as contribution, contact history, survey response, engagement points, and more.
- **Email to Notes:** Push the text of your Outlook, Gmail, or other email communications with your supporter automatically into their F&E contact record.
- **Financial Batch:** Group contributions together and assign them to a batch for reconciling banking statements and ensure that information is not changed once checks have been deposited.
- **Financial Households:** Let users create custom households to account for individual donors who contribute money together.
- **General Ledger:** organize all your financial transactions.
- **Giving History:** See the whole picture of your contact's data and track their giving journey.
- **Mail Merge:** With an integrated Mail Merge tool, you can easily create a mail merge template within F&E and generate thank-you letters using any report columns as merge fields.
- **Pledges:** Track pledges, document pledge agreements, establish timelines, and monitor your pledge fulfillment rate year over year.
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- **(Pro and Enterprise Only) Targets:** Dynamically segment your audience into mutually exclusive groups to better target fundraising, advocacy, and communication efforts.
- **(Pro and Enterprise Only) Custom Calculated Fields:** Custom data field that allows you to enter or calculate data for your specific need.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Fundraising Essentials

### Introduction

Fundraising Essentials offers the industry-leading, easy-to-use "all-in-one" fundraising solution for small nonprofits or small teams purchasing their first fundraising software.

### Capabilities

This service includes but is not limited to:

- **Donor Management:** Enjoy a mobile-friendly, cloud-based platform that allows your organization to gain clear insights into everything that is happening within your organization as it pertains to donors, stewarding, and gifts.
- **Online Fundraising Pages:** Launch unlimited campaigns & events as unique as your organization. These are completely customizable to your branding and allow you the freedom to showcase your organization's story and mission.
- **Peer-to-Peer Fundraising Pages:** Empower your network of donors to fundraise on your behalf as your Peer-to-Peer (P2P) fundraisers or to create their own fundraising teams to amplify their efforts.
- **Basic Event Pages:** Intuitively designed templates for your event landing page.
- **Email Messaging:** Engage with supporters via automated thank you emails crafted by your organization and tied to your donation receipts.
- **SMS Messaging:** Mobile Messaging (SMS) is a powerful channel that allows your organization to augment your existing communications in order to reach supporters

instantly and maximize engagement. Our Mobile Messaging product is integrated with the rest of the platform, so your organization can easily create, track, and analyze your campaigns all in one place.

- **Video Messaging:** Engage directly with your supporters with a personalized thank you video as a more individual approach, directly integrated with F&E.
- **Direct Mail Management:** Keep track of your contacts, donor addresses, quantity mailed, and print labels to send direct mail to your supporters.
- **Dashboards & Reporting:** Customizable Dashboards for Donations, Tasks, Donor Tracking, Funding, and Campaigns.
- **Essential Events:** Manage your event's overview, tickets, sponsorships, and any auctions that you connect.
- **Auctions:** Create an auction page, add items, manage bidder registration, adjust bidding settings, and link with your event.
- **Livestream Video & Attendee Chat:** Host a livestream on your event page with moderated live chat.
- **Text-to-Give:** Allow your supporters to contribute from anywhere at any time by creating a mobile-friendly donation page that supporters can reach by texting your organization's keyword to your assigned 5-digit shortcode.
- **Sponsorships:** Available in Essential Events, you can add and track sponsorships, set up different levels, create a button for potential sponsors, and add sponsor logos and websites.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Engagement (Standalone Solution)

### Introduction

Engagement enables customers to manage all their one-to-many marketing and advertising fundraising programs in order to engage more donors, volunteers and advocates

### Capabilities

This service includes but is not limited to:

- **Targeted Email:** Run a smarter, integrated email program using our easy-to-use visual editor, powerful A/B multivariate testing tool, one-click donations, and advocacy actions.
- **Online Action Forms:** Enable monetary and non-monetary contributions, fostering volunteerism, financial support and advocacy seamlessly. Leverage a variety of form types (Recurring donations, tribute donations, one-time donations, advocacy, peer-to-peer, story collection and more). Track form performance (Views, Conversion Rates, Submission Rates and more).
- **FastAction:** Enable supporters to save their profile and payment information for faster giving, volunteering and advocacy actions later. Additionally, experience higher conversion rates when any one of Bonterra's 20M+ profiled supporters engages with you.
- **Supporter Groups:** organize your supporters into the right groups to drive more effective messaging, campaigns, events and more.
- **Dedicated Tollfree Number:** Offer direct, accessible support to supporters.
- **SMS (text messages):** augment your existing communications in order to reach supporters instantly and maximize engagement. Our Mobile Messaging product is integrated with the rest of the platform, so your organization can easily create, track, and analyze your campaigns all in one place.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS communications. The details of those limits and fees will appear in customer contracts.*
- **MMS (Pictures, Video, Audio):** Incorporate images, gifs, videos, contact cards, etc. Into your mobile messaging.
  - *Note: customer subscriptions will include usage limits and usage fees related to SMS and MMS communications. The details of those limits and fees will appear in customer contracts.*
- **Keywords:** Create custom keywords to engage with supporters and grow your opt-in list. Use keywords to automate responding with links to your forms, for text to donate, or to text to sign up.
- **Automation & Scheduling:** Streamline processes with automated actions and scheduling.
- **Advocacy Tools:** Create an advocacy form and configure the advocacy step to ask supporters to contact their elected officials and custom targets in support of a particular cause, policy or bill.
- **Inbox & 1:1 Communication:** Manage an inbox and facilitate direct, personalized communication to your supporter base.
- **Full API Access:** Harness the full potential of the platform through API integration capabilities.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Volunteer Management (Standalone Solution)

### Introduction

Volunteer Management empowers customers to plan volunteer activities, manage volunteer events and cultivate volunteer relationships.

### Capabilities

This service includes but is not limited to:

- **In-person and virtual event management:** recruit volunteers, manage check-in and track attendance for in-person and virtual events.
- **Real-time event data:** React in real-time using live data that tracks how your event is progressing.
- **Post-event feedback:** use email or text surveys to continually gather qualitative feedback and attendance data from your volunteers.
- **Automated email and SMS messages:** create a personalized and engaging volunteer experience before, during and after volunteer events.
- **Supporter-created events:** Empower your supporters to create events that advance your cause, all with straightforward approval processes and permission levels.
- **Social Sharing Capabilities:** Enable your supporters to engage their network
- **Feed, newsletter and suggestions:** Help existing supporters find the best next action to take.
- **Full API access:** Harness the full potential of the platform through API integration capabilities.

## Giving Days (Standalone Solution)

### Introduction

Giving Days gives customers access to both our giving day technology as well as our professional services team to execute giving days successful giving days that generate both funds and new supporters.

## Capabilities

This service includes but is not limited to:

- **Leaderboards:** Foster competition and motivation among your participating groups and fundraisers.
- **Dedicated Showcases:** Show off participating groups on your main landing page with branded tiles showcasing the total dollars raised and unique donors or total gifts.
- **Landing Page Enhancements:** include unique enhancements such as gift heat maps and confetti celebrations on your homepage to engage more supporters.
- **Livestream:** Host a virtual party on YouTube Live and embed it right on your homepage.
- **Text-to-Give:** Enable easy donation through text messages.
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*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Events and Auctions (Standalone Solution)

### Introduction

Events and Auctions empowers customers to manage and optimize their supporter experience for ticketed events and online auctions.

### Capabilities

This service includes but is not limited to:

- **Event Configuration:** manage all the details of your event, including: registration, ticketing, RSVPs, check-in functionality, promo codes and discount codes.
- **Event Livestream Video & Attendee Chat:** Engage attendees through live video and chat interactions during events.
- **Event Sponsorships:** Expand your reach with sponsor solicitation and management.
- **Multiple Auction Types:** Run a silent, live or fixed price auction depending on the needs of your organization.

- **Auction Configuration:** Manage all the details of your auction including: start and end times, item images, starting bid amounts, minimum bid increments, buy it now prices, and more.
- **Auction Communication Management:** Set automatic email notifications to indicate when auctions have started and ended, as well as to follow up with attendees who made commitments to pay.
- **Full API Access:** Integrate event and auction functionalities seamlessly.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Nonprofit CRM (Standalone Solution)

### Introduction

Nonprofit CRM functions as the source of truth for all of a customer's interactions with their supporters.

### Capabilities

This service includes but is not limited to:

- **Workflow Automation:** Create/edit workflow automations such as automatically enrolling contacts, assigning staff, scheduling follow ups, analyzing contacts, applying Activist Codes to tag and track contact attributes, and send contacts down customized communication journeys.
- **Duplicate Management:** Search for possible duplicates, view two possible duplicates side-by-side to confirm, merge two duplicate records. Receive a Duplicate Analysis Report (DAR) and bulk merge duplicates that you confirm.
- **Monetary Online Actions:** Access to Contribution forms for accepting donations (Recurring/Tribute/One-time), enabling email confirmation, and creating a sharing option.
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message' page with donation details upon form submission with prompt for user to download.

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- **CRM Reporting:** Access to a variety of different reports such as contribution, contact history, survey response, engagement points, and more.
- **Email to Notes:** Push the text of your Outlook, Gmail, or other email communications with your supporter automatically into their F&E contact record.
- **Financial Batch:** Group contributions together and assign them to a batch for reconciling banking statements and ensure that information is not changed once checks have been deposited.
- **Financial Households:** Let users create custom households to account for individual donors who contribute money together.
- **General Ledger:** organize all your financial transactions.
- **Giving History:** See the whole picture of your contact's data and track their giving journey.
- **Mail Merge:** With an integrated Mail Merge tool, you can easily create a mail merge template within F&E and generate thank-you letters using any report columns as merge fields.
- **Pledges:** Track pledges, document pledge agreements, establish timelines, and monitor your pledge fulfillment rate year over year.
- **Revenue Streams:** Track all different sources of revenue so that inbound contributions can be attributed to a revenue stream when posted to the general ledger.
- **Split Gifts:** Allows for the attribution to be split by amount or percentage when more than one person is responsible for the contribution.
- **Compliance:** Easily generate state disclosure or compliance reports.

*Note: customer subscriptions will include payment processing fees related to all financial contributions. The details of those fees will appear in customer contracts.*

## Add-Ons

The following add-ons are designed to unlock customer and supporter value for one or more of the solutions above.

- **Dedicated Short-code SMS Setup (Random):** Use a randomly assigned 5- or 6-digit number designed for high-throughput SMS and MMS messaging
  - *Prerequisite solutions: F&E Pro, F&E Enterprise or Engagement*
- **Dedicated Short-code SMS Setup (Vanity):** Use a customer-selected 5- or 6-digit number designed for high-throughput SMS and MMS messaging.
  - *Prerequisite solutions: F&E Pro, F&E Enterprise or Engagement*
- **SmartVAN:** Access the voter file to improve the targeting and results of organizing.

- Prerequisite solutions: *F&E Pro, F&E Enterprise*
- **Importacular Sync:** Leverage a bi-directional integration between Bonterra with Razors Edge CRM.
  - Prerequisite solutions: *F&E Pro, F&E Enterprise, Engagement, Volunteer Management or Nonprofit CRM*