Salsa CRM - Product Description

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Product Summary	
Salsa CRM is a browser-accessible, constituent relationship manager that provides users with tools to get a 360 view of their donors and supporters, including robust reporting, query, and wealth estimation options. When integrated with Salsa Engage, Salsa CRM provides even more ways for organizations to pinpoint and connect with the type of people they need to fulfill their mission.	
Term	**Definition**
CRM	Constituent Relationship Manager, a tool used to manage, report, and contact donors and supporters
AQW	Advanced Query Wizard – A powerful query tool within CRM that allows the user to query data via premade or custom queries across all the data available in the system.
Constituent	Commonly referred to as a donor or a supporter, constituents in the CRM are any records tied to a donor or a supporter.
Salsa Engage	Engage is Salsa digital communications and fundraising platform. It is not a CRM but is integrated with Salsa CRM to share data allowing users to manage their constituents within the CRM and conduct digital outreach to and fundraise from those constituents via Engage.
Smart Group	A smart group is like a dynamic group in Engage, these are groups that are built from a query and update daily based on constituents matching or no longer matching the criteria.
Tasks	A task in CRM is a follow up item a user can set for themselves or another user which notifies that user of an upcoming action that will need to be completed, like reaching out to a big donor about a promised donation or running a monthly report for their development director.
Membership	Membership is where organizations with membership plans can set up and manage their members subscriptions and set triggers about renewals.

Cultivation	Cultivation in the CRM is where donor relations managers can go to set and mark off tasks and steps toward cultivating gifts from major donors.
Dashboard	The dashboard is the splash page users see once they first login into their CRM. This is customizable, so users can pin any reports or information they want to see right to their dashboard.
Integrations	Integration in CRM refers to Engage. While we have 3rd party integrations available, anytime someone mentions integration alone they are talking specifically about the direct integration between Salsa CRM and Salsa Engage
Deep Linking	Deep Linking refers to users being able to click a link to access their Engage account directly from the CRM, assuming they have the appropriate user permissions, and the org is also using Engage. This allows users to go straight into their Engage account from the CRM to manage any shared data.

Business Process 1: Constituent and Donor Reporting
Describe the business process the product facilitates. Copy this table for additional processes.
CRM customers can report on any piece of data they have in the CRM on their constituent's profile. They can also run reports to audit user behavior like seeing which users changed or deleted information from a constituent record, imported records, or created groups. All this information helps guide and inform fundraising professionals when running campaigns and when putting together reports for 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 development professional, I would like to track and report on our supporters and our total fundraising efforts, both online and offline"	**Auto Engage Sync and Supporter Importing** CRM syncs with Engage online fundraising data and any supporters captured through forms in Engage, so users do not need to import online donations if using Engage with CRM. For offline donations, users can import supporters and gifts
"As a development professional, I would like to build my own reports and report on specific segments of my constituency" "As a development professional, I would like to	**AQW and Run Reports** Users can utilize built in reports to report on constituent and donation information. These can be run right away or scheduled to run at various intervals. If built-in reports do not provide the exact information or type of report they desire, users can use

export reports I run so I can use them for accounting purposes" "As a development professional, I would like to see my most important metrics right when I login"	the Advanced Query Wizard (AQW) tool to build their own report with any available data point. With the AQW tool users can also query on groups created already or create a smart group based on the query they are running. All reports are exportable in both excel and PDF friendly formats. Report exports can be set to be emailed to a user as well. There is also an option to export reports in a QuickBooks friendly format. Any saved reports can be pinned to an individual user's dashboard.
"As a development professional, I would like to have analytics on potential giving capacity for donors who I do not have a personal relationship with yet, so I can segment and target them more efficiently when conducting fundraising campaigns"	**Wealth Estimation** The CRM has a few options for wealth estimation. If a donor's record/profile has a history of giving, our smart ask machine learning will calculate a giving range for that donor. CRM also integrates with both WealthEngine and DonorSearch to provide full wealth scores and profiles for donors. If a user already has an account with one of those platforms, they just click the option to integration and connect their account to their CRM to use on any donor's record.

Business Process 2: Constituent and Donor Outreach
Describe the business process the product facilitates. Copy this table for additional processes.
CRM customers can utilize built-in tools to solicit and communicate with their donors and constituents. Additionally, with the integration between Salsa CRM and Salsa Engage, users can craft lists and queries in the CRM that push to Engage for email targeting.

Use Case(s)	Capability
How users will perform tasks to achieve their goal	*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 fundraising manager, I want to be able to quickly look up an individual supporter or organizational partner and find all the information I have recorded for that person within one area"	**Robust Constituent Profiles** Each individual user can configure their view of the constituent profile pages so the main biography page houses all the top-end information they need for their role. They can then deep dive into areas of the constituent's profile to see further information like complete giving history, any

	outreach, actions in Engage that donor had completed, and a host of other information a development professional might need.
"As a fundraising professional, I would like to pull a list of all supporters or specific supporters and craft a mail campaign aimed towards them or send monthly thank you letters to donors" "As a fundraising professional, I would like to pull a list of all supporters or specific supporters and craft an email campaign aimed towards them"	**Mail and Word Processing** After a report has been run or a query made, users have a handful of actionable options they can take with supporter records captured in the report. One option is to craft a mail campaign. This allows the user to bulk print out mailing labels and donation or thank you letters for each supporter in the query results. Users can upload a letter document created offline or directly within CRM's built-in word processor and assign that to the donor record. Users also have the option of integrating with Google Docs instead of using the built-in processor. Users without access to Engage can use CRMs built-in email tool, though it is extremely limited compared to the design features and ease-of-us of Engage's editor. **Engage Integration** Users whose organizations also use Salsa Engage can push the list created in CRM to Engage to use as an email blast audience. The user will then deep link into Engage and create the content and send the blast if an existing template or email is not already set.
"As a fundraising professional, I would like to track my outreach to specific donors and track follow ups required"	**Cultivation** The cultivation section in Salsa CRM allows the user to set up actionable follow ups and track completed items during the donation cultivation process. Particularly helpful for large donors who require a lot of touches, this allows development processionals to track what outreaches they have made already, what follow ups they need to do, and gifts that have previously been promised by donors which need a follow up. The tasks here are customizable, so users can configure them as they please.
"As an organization with a membership structure, we need a platform to manage our new and renewal membership payments and track membership details"	**Manage Memberships** The membership management tab within CRM allows users to create and manage their own membership
"As an organization with a lot of intake forms, I would like to be able to manage those forms online without needing to	**Forms** CRM allows users to build forms so they can enter offline form collection data into appropriate fields on a constituent profile. These are not online forms, they are forms within the CRM that allow users to recreate any

reference offline materials alongside my CRM"	offline forms they use for their constituency (I.E., Volunteer forms, or pet adoption applications) and even use the CRM to digitize these forms and use at point of contact by enter information in real-time when talking with constituents.