System C

5000 records		
unlimited users		
free, weekly training;live, web-based,from the convenience of your computer.Plus free 90 min 1 on 1 implementation training		
Annual 7488.96 year	2.89% plus .25 per transaction for debit and credit cards provided by First Data plus $20	
included		
included		
included		
included		

included in annual run		
not included, but is with extra cost		
included		
included for 1000 texts		
not included?		

Requirements	Code	
General		
Must be compatible with all modern web browsers (Internet Explorer, Edge, Firefox, Chrome, Safari, etc.) O	O	
Must utilize a mobile friendly, responsive design that is compatible on iOS and Android mobile devices.O	O	
Administrator must be able to configure role-based permissions and individual user permissions.	O	
	Code	
Application administrators can create and configure new items (forms, messages, reports) without vendor assistance.		
Field level auditing for all fields (ie. Identify the data entry date, source, whether manually entered or online)		
System will provide access for 5 data entry users and one read only user	O	
Form fields can be made mandatory		
Drop-down field values can be customized.		

Bottomless storage for file attachments	O	
Cloud based SaaS system accessible from an internet enabled device O		
Nonprofit will have all ownership of the data stored on the platform with the ability to extract it in full		
Security controls can be set to define which users can see certain donor	O	
Must handle between 2900-4999 Donor records O	O	
Data migration O	O	
Must offer Volunteer management	O	
On going online training available for new staff members O	O	
Donors, Event participants, volunteers can create account log in to access and view their demographic information (Messaging name, spouce name, Address #1, Alternative Address #2, Email #1, Email #2, Land line telephone, Mobile Phone, preferred communicaiton method, company Demographics, Company Matching program, DAF name, Household members, Social media ID	N	Available in app for a cost
Ability to set up a peer to peer campaign O	O	
Ability to select event ticket registration from desktop and mobile. E	O	
Ability to pledge contributions from desktop and mobile O	O	
Ability to make one time gift or recurring gift from desktop and mobile O	O	
Volunteers can sign up to complete work assignment O	O	
Donation/Pledge Processing		

Ability to bill recuring gift or pledge payment when due O	O	
Source of payment O		
Abiltiy to report Ticket Cost Value E	0	
Ability to designate gift as "in memory of", "in honor of", Campaign, Designation O		
Ability to export billing to be used by accounting department O		
Requirements	Code	
Ability to import payments of pledges or recurring gifts or donations from accounting system O		
Ability to assign soft credit to another donor for a donation transaction O		
Track daily donations, event ticket sales, sponsorships received O	O	
Donor Record		
Individual Donor is assigned a unique ID. O		
The segmentation of data for multichannel communitication O		
View and link to all related records by event/registrant/family. O	O	
Participants, donor, volunteer can be enrolled in multiple event simultaneously. E		
Ability to create and manage custom forms and fields to collect O		
program-specific intake information.		
Ability to upload documents, such as consent, images, designation letters O	O	
Ability to add/change fields over time O		
System can generate automated notifcations or alerts abour participants O	O	
Systen can manage/record email, SMS, and live communications with donor, volunteer, participantO	O	
Integrate donor record with user entered donation page data 16 years of donation history will be migrated from Giftworks to proposed system O	available in app	additional cost

16 years of donation history will be migrated from Giftworks to proposed system	no	
Relationships between records must be possible, particularly for people from same familyO	O	
Moves Management Task Assignment O	O	
Donation Date O	O	
Transaction Entered Date O		
Communication Date O	O	
Thank you date O	O	
Reporting		
Ability to save queries O		
Monthly giving reports O	O	
Donor Activity report O	O	
Campaign Report O		
Designation Report O		
Campaign ROI O		
Grant Calendar O	O	
Major Gift task calendar O	O	
Ticket/Event Sales Report E	O	
Donor Retention calculation O	O	
Volunteer retention E	O	
Attendee history O	O	
Corporate sponsorship history O	O	
Event ROI O	NO	
Requirements	Code	
Communication		
Mail merge with donor data inserts O	O	

Correspondence- ability to save outside of the cloud. O	O	
Ability to use custom fonts for letters O	O	
Ability to use custom sized correspondence for letters O	some limits as to number of character a	
Robust email abilities that segregate and automated messaging O	N0	
Integration		
Payment and Website Integration O	O	
Emailing Interface O	O	
Donor wealth management system integration	E	Integration with DonorSearch or wealth engine is an additional cost