



DonorFirstX is a cloud-based SaaS planned giving account management platform that provides a secure, configurable and socially powerful interface for donors and program staff.

OVERALL BENEFITS	BASE	ADD-ON
 <p><b>ACCESSIBLE</b> DFX complies with all WCAG 2.0 AA requirements.</p>	<input checked="" type="checkbox"/>	
 <p><b>CONFIGURABILITY</b> The platform provides customization by fund type or for a specific fund.</p>	<input checked="" type="checkbox"/>	
 <p><b>BRANDED PLATFORM</b> DFX is designed to match the unique style and brand of each program.</p>	<input checked="" type="checkbox"/>	
 <p><b>FLEXIBLE</b> Programs configure DFX based on their program's needs, including necessary data imports and exports.</p>	<input checked="" type="checkbox"/>	
 <p><b>RESPONSIVE</b> Usable across all devices, from desktop computers to tablets and smart phones.</p>	<input checked="" type="checkbox"/>	
 <p><b>SCALABLE</b> Built in a modular way for easy scalability as the number of funds and users on the platform grows.</p>	<input checked="" type="checkbox"/>	
 <p><b>SUB-BRANDING</b> Allows programs to create sub-brands for their institutional programs.</p>		<input checked="" type="checkbox"/>

FUNDS		BASE	ADD-ON
 <p><b>DAF ONLINE APPLICATION</b> A complete online account application for Donor-Advised Funds.</p>	<input checked="" type="checkbox"/>		
 <p><b>E-SIGNATURES FOR APPLICATIONS</b> Enhances the online account application allowing for a completely paperless process.</p>		<input checked="" type="checkbox"/>	
 <p><b>FUND PROFILE</b> Allows programs to view and/or edit basic information about a fund.</p>	<input checked="" type="checkbox"/>		
 <p><b>FUND SPECIAL HANDLING</b> Ability to prioritize a fund(s) in workflow.</p>	<input checked="" type="checkbox"/>		
 <p><b>INTERFUND TRANSFERS</b> Ability for cash or assets to be transferred from fund to fund.</p>	<input checked="" type="checkbox"/>		
 <p><b>SINGLE SIGN ON</b> Creates one login allowing donors to access multiple systems.</p>		<input checked="" type="checkbox"/>	
 <p><b>SPLIT FUNDS</b> Allows for programs to split funds into a designated and restricted fund.</p>	<input checked="" type="checkbox"/>		
 <p><b>VIEW FUNDS IN AGGREGATE</b> Allows donors to view a listing of their funds with the total value.</p>	<input checked="" type="checkbox"/>		

MARKETING/DONOR ENGAGEMENT		BASE	ADD-ON
 <p><b>CONTRIBUTION GOALS</b> Enables donors to set goals for making contributions to their fund and provides tracking against those goals.</p>	<input checked="" type="checkbox"/>		
 <p><b>CURATED CONTENT</b> Programs can create custom content to distributed across their site or by fund type.</p>	<input checked="" type="checkbox"/>		
 <p><b>DONOR EMAIL ALERTS</b> Donors can subscribe to email alerts when certain activities occur in their fund, including new account submission, contribution received, grant paid and address changes.</p>	<input checked="" type="checkbox"/>		
 <p><b>GIVING GOALS</b> Enables donors to set goals for making grants from their fund and provides tracking against those goals.</p>	<input checked="" type="checkbox"/>		
 <p><b>GIVING OPPORTUNITIES</b> Programs can promote specific giving opportunities to donors.</p>	<input checked="" type="checkbox"/>		
 <p><b>MOBILE APP</b> Branded mobile app available through iTunes or Google Play store.</p>		<input checked="" type="checkbox"/>	
 <p><b>CHARITABLE IMPACT</b> Provides donors with information about how there fund is making a difference based on NTEE categories.</p>	<input checked="" type="checkbox"/>		
 <p><b>CHARITABLE IMPACT GROUPS</b> Allows programs to create custom content using RSS feeds or HTML.</p>	<input checked="" type="checkbox"/>		

MARKETING/DONOR ENGAGEMENT		BASE	ADD-ON
 <p><b>SOCIAL MEDIA INTEGRATION</b> Donors can share their fund activity with their social network.</p>	<input checked="" type="checkbox"/>		
 <p><b>STAFF EMAIL ALERTS</b> Program staff can subscribe to email alerts that provide information on donor activity.</p>	<input checked="" type="checkbox"/>		
 <p><b>TWO-WAY COMMUNICATION</b> Provides program staff and donors with a secure messaging area to prevent data loss.</p>	<input checked="" type="checkbox"/>		
CONTRIBUTIONS			
 <p><b>ACH PROCESSING</b> Donor can transfer cash or assets to their fund using an ACH transaction.</p>		<input checked="" type="checkbox"/>	
 <p><b>ASSET TRANSFER INSTRUCTIONS</b> Provides donors with necessary information to transfer cash or assets to their fund.</p>	<input checked="" type="checkbox"/>		
 <p><b>CREDIT CARD PROCESSING</b> Donors can make credit card contributions to their fund.</p>		<input checked="" type="checkbox"/>	
 <p><b>NON-CASH CONTRIBUTIONS</b> Ability to process and display all types of contributed assets, including both publicly traded assets and non-publicly traded assets.</p>	<input checked="" type="checkbox"/>		

GRANTS		BASE	ADD-ON
 <p><b>BATCH GRANT UPLOADS</b> Programs can batch upload a file with multiple grants.</p>	1Q18	<input checked="" type="checkbox"/>	
 <p><b>BATCH PROCESSING</b> Programs can bulk approve grants at various workflow steps.</p>		<input checked="" type="checkbox"/>	
 <p><b>BOARD APPROVALS</b> Programs can provide different board approval requirements based on the fund type or the fund.</p>	1Q18	<input checked="" type="checkbox"/>	
 <p><b>COMPLEX GRANT REQUESTS</b> Dynamic fields are used to capture and track additional information pertaining to complex grant requests.</p>			<input checked="" type="checkbox"/>
 <p><b>CONFIGURABLE VETTING STANDARDS</b> Vetting standards can be configured at the fund type or at the fund level.</p>		<input checked="" type="checkbox"/>	
 <p><b>FUTURE GRANTS</b> Allows donors to submit grant recommendations to be processed at a future date.</p>		<input checked="" type="checkbox"/>	
 <p><b>GRANT CHECK PROCESSING</b> Full service administration of charity payment from processing, printing and distribution.</p>			<input checked="" type="checkbox"/>
 <p><b>GRANT STATUS</b> Provides for customizable grant processing workflow steps based on the fund type or by fund.</p>		<input checked="" type="checkbox"/>	

GRANTS		BASE	ADD-ON
 <p><b>GRANTEE SPECIAL HANDLING</b> Special handling documentation at the grantee level displayed as an alert in the grant workflow.</p>	<input checked="" type="checkbox"/>		
 <p><b>GUIDESTAR INTEGRATION</b> Integration assist with grantee vetting requirements.</p>	<input checked="" type="checkbox"/>		
 <p><b>LARGE GRANT STAFF ALERT</b> Triggers an email alert to designated staff about the submission of large grants.</p>	<input checked="" type="checkbox"/>		
 <p><b>OFAC AUTOMATION</b> Integration with the program's existing OFAC processes.</p>		<input checked="" type="checkbox"/>	
 <p><b>RECURRING GRANTS</b> Donors can submit recurring grant recommendations based on a monthly, quarterly, semi-annual or annual basis.</p>	<input checked="" type="checkbox"/>		
 <p><b>SUPPORTING DOCUMENTATION UPLOADS</b> Ability to upload documents that support the grant recommendation and/or grantee vetting.</p>	<input checked="" type="checkbox"/>		
ANALYTICS & REPORTING			
 <p><b>ADVANCED GOOGLE ANALYTICS</b> Creation of custom filters, tags &amp; segments to generate better reports about user activity and guide business decisions.</p>		<input checked="" type="checkbox"/>	
 <p><b>CUSTOM FISCAL YEARS</b> Allows programs to set different fiscal years by program.</p>	<input checked="" type="checkbox"/>		

## ANALYTICS & REPORTING

BASE

ADD-ON



### CUSTOMIZABLE BOARD ROSTERS

Establish and configure board rosters for different funds.

1Q18



### DYNAMIC FIELDS

Fields can be added to funds, contributions and grants.



### DYNAMIC LETTER TEMPLATING

Different letter templates based on fund type or at the fund level.



### GOOGLE ANALYTICS

Google Analytics tracking codes installed in DFX so programs can gain greater insight about user activity.



### ON DEMAND REPORTING

Ability to generate customized reports.



### USER ANALYTICS

Reporting on user activity and system usage.

DATA EXCHANGE		BASE	ADD-ON
 <p><b>DATA EXPORTS</b> Automated export of data from DFX to systems of record.</p>	1Q18	<input checked="" type="checkbox"/>	
 <p><b>DATA IMPORTS</b> Automated import of data from systems of record into DFX.</p>	1Q18	<input checked="" type="checkbox"/>	
 <p><b>RESTful APIs</b> Provides for a program interface to map and schedule data for import/export.</p>			1Q18 <input checked="" type="checkbox"/>
SECURITY			
 <p><b>CUSTOMIZABLE PASSWORD SETTINGS</b> Allows clients to customize the length and strength of password settings.</p>		<input checked="" type="checkbox"/>	
 <p><b>TEMPORARY PERMISSION SETTINGS</b> Provides for temporary user permissions that can be set to enable and expire based on client's needs.</p>		<input checked="" type="checkbox"/>	
 <p><b>UNLIMITED SECURITY ROLES</b> Provides for an unlimited number of security roles in order to help ensure segregation of duties.</p>		<input checked="" type="checkbox"/>	