

## Sprint Details

The following document provides an overview of the categories/topics which will be covered and developed per sprint. Including Portal Sprint information.

### **Audience for Sprints 1-4**

Records Management, Corporate/Foundation Relations

#### Sprint 1: Bio Demo 1 – Constituent

- Constituent Record (Contact) & Basic Bio Information
- Constituent Names
- Salutations
- Phones
- Emails
- Social Media Accounts
- Addresses & Address Relations
- Constituent IDs

#### Sprint 2: Bio Demo 2 – Constituent Related

- Involvements & Involvement Codes
- Service Indicators & Service Indicator Codes
- Degree Info (including Degree Code, Post Code, and Minor Code)
- Relationships (Constituent to constituent)
- Funding Interests
- Constituent De-Duping Rules

#### Sprint 3: Bio Demo 3 – Organizations & Related Records

- Organization Record (Account)
- Organization Names
- Phones
- Emails
- Social Media Accounts
- Addresses & Address Relations
- Involvements
- Service Indicators
- Affiliations (Constituent to Org)
- Related Organizations (Org to Org)
- Org hierarchies (if applicable)

#### Sprint 4: Bio Demo 4 – Households & Bio Demo Other

- Household Record (Account)
- Household Members
- Household Names
- Household Emails
- Household Phones
- Household Addresses & Address Relations
- Household Involvements
- Household Service Indicators
- Cases (for Bio Update Requests)
- Knowtify

#### **Sprint 5 Audience:**

Finance/Accounting; Gift Processing; Appeals Management

#### Sprint 5: Gift Processing Referential

- Designations
- Appeals Management/Campaigns
- Hard and Soft Credit defaults (Relationships, Affiliations, Credit Calculations)
- Sessions

#### **Sprints 6-7 Audience:**

Gift Processing; Appeals/Campaign Management

#### Sprint 6: Outright & Matching Gifts

- Outright Gifts
- Designation Details
- Hard & Soft Credits
- Tributes
- Gift Premiums (Assets, Products, & Price Books)
- Non-Gift Products
- Matching Gift Claims
- Matching Gift Disbursements
- Corrections & Adjustments (to Outright Gifts)
- Expedited Gift Processing UI and Opportunity configurations

### Sprint 7: Pledges, Recurring Gifts, & Payments

- Pledges
- Installments
- Planned Gift Processing
- Pledge Payments
- Recurring Gifts
- Recurring Gift Payments
- Stock & Stock Payment gifts
- Corrections & Adjustments (Pledge and Recurring Gifts)
- Mass Actions in Expedited Gift Processing (Adjustments, Corrections, Payments)
- Expedited Gift Processing UI and Opportunity record configurations

### **Sprint 8 Audience:**

Data/Integrations; Gift Processing

### Sprint 8: RTV2 and Interims

- Interims
  - Matching Rules
  - De dupe Processing
  - Batch Processing
  - Bio/Demo Loads
- Review Transactions v2
  - Outright gifts
  - Pledges
  - Pledge payments
  - Recurring gifts
  - Recurring gift payments
  - Interims integration

**Sprint 9 Audience:**

Stewardship Team; Endowment Financials

Sprint 9: Stewardship, Memberships/ Giving Societies

- Giving Societies
- Membership Levels
- Membership Benefits
- Society Memberships
- Paid Memberships
- Automations, Renewals
- Designation Stewardships
- Designation Beneficiaries
- Stewardship Activities
- Endowment Financials
- Acknowledgements
- Naming Opportunities/Recognition
- Naming Opportunities/Recognition continued

**Sprints 10 and 11 Audience:**

Prospect Research and Management; Fundraising Team

Sprint 10: Prospect Research

- Custom "Prospect" record and related objects
- Assignments
- Stage of Readiness
- Work Plans
- Research
- Briefings
- Funding Interests
- Wealth Ratings/Scoring

Sprint 11: Prospect Management

- Strategies
- Contact Reports
- Files
- Proposals
- Planned Gift Proposals
- Tasks
- Action Center

**Sprint 12 Audience to be defined during backlog grooming**

**Donor and Alumni Portal Sprint Audiences to be defined later in project**

Portal 1: User Access and Information Management

- Portal Overview
- Module Feature Review
- Branding and Domains
- Payment Processing
- Contact Information
- Employment Information
- Social Media Information
- Privacy Settings
- Club/Group Zones and Home Pages
- Club/Group Search, Announcements and Leadership Pages
- Volunteers, Jobs, Shifts and Skills
- Volunteer Pages and Engagement

Portal 2: Online Giving & Giving History

- Online Giving Designations, Tributes, Matching Gifts
- Online Giving Gift Types
- Giving History Tables and Tax Letters
- Giving History Views
- Memberships Pages
- Membership Payments and Management