ChapterSpot Feature List

Feature list for ChapterSpot Portal and Salesforce

ChapterSpot Features (Portal)

Portal (For your members)		
Messaging		**Form Solution**
Email		Assign Forms
Dashboard Announcement		Create Due Dates
Events		Form Library
Link to External Calendars		Required Fields
RSVPs		Dependent Fields
Meeting Minutes		Point Scoring Fields
Internal Events		Form Sync with Salesforce
Attendance Tracking		Multiple Officer Forms
Documents		Custom HQ Approval Rules
Share Documents		View Only Feature
Create Folders		Approvers Comments
Share by Status, Circle, Member		Email Notification Settings
Upload Multiple File Types		Review Options for Approvers
Mass Emailer		Required & Optional Fields
HTML Newsletters Templates		Custom Status Routes
Mail Merge Variables		Status Route Questions
Multiple Templates		Status Change Auto Bills
Track Messages		Bulk Status Changes
Track by Messages by Chapters		HQ Approval Routes for Status Changes

Unsubscriber Management	Search
Website	Permissions
Chapter Websites	Custom Circles
Organizational Branding	Export to CSV
Content Editors	Start and End Date for Roles
Social Media Connections	Role-Based Permissions
Inquiry Forms	Request Missing Profile Email
Accept Donations	**Recruitment**
Show List of Current Roles ("Officers")	Campaigns
Publish/Unpublish	Customizable Stages
Preview Changes	Goal Tracking
Recruitment/New Member Interest Forms	Integration With Chapter Website
Custom Pages	Integration With HQ Website
Customizable Inputs (HQ controls template editability)	CSV Upload
Support Two Google Analytics Tags	Recruitment Sign-Up Forms
Approval Management for Image Uploads	Legacy Tracking
New Member Registration	Scholarship Applications (SFMS Required))
Invite Members	Report Prospects
Customizable New Member Invite Message	Accepts PDF Uploads
Customizable New Member Registration Questions	Customizable Profile Fields
Require TOS/Contracts Questions to Complete Registration	Track Induction and Initiation Dates
Auto-Generation of New Member Fees	

Salesforce Features

Salesforce Features		
Contact Management		**Donation Management**
Contact Information		Manage Pledges

Relationships in the Organization	Set Schedule Payments
Roles	Matching Gifts
Donation History	Recurring Gifts
Impact Tracking	Customizable Donation Forms
Awards	Endowment Fund Information Tracking
Events Attended	GAU Allocations
Apps for Geolocation	Moves Management
Google Maps Integration	Donor Levels
Seasonal Addresses	Fund Management
Hard and Soft Credits	Multiple Payment Gateways
Employment Status	Auto-Generated Thank You Email Receipts
Family Relationships	Virtual Terminal
Email Marketing	Batch Check Entry
Blast Emails	In Memoriam Gifts
Scheduled Emails	Grant Management
User Subscription Management	Manage Tasks, Notes, and Attachments
Manage Tasks, Notes, and Attachments	Wealth Screening
Other	**Reporting**
Native Mobile Apps	Create Reports With Drag and Drop Interface
Email Integration with Outlook and Gmail	Organize Reports in Folders
Task and Activity Tracking	Schedule Reports To Run Automatically
App Exchange Integration	Subscribe To Reports With Auto-Notifications
Custom Page Layouts	Export Results to a CSV
Track Appeals	Populate Campaigns With Reports
Integration With LMS	Create Dashboards From Reports
Add New Fields/Data Models	
Field Tracking	