



Product Descriptions

Definition of the platform, product modules, and add-ons

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For information regarding Benevity's Services, please see the [Service Descriptions](#).¹⁴

Product

Module Name	Description					
Platform	<p>Benevity's Platform enables teams using Donate or Volunteer to access functionality that organizes, manages, and reports on their social impact program.</p> <p>Clients are required to purchase a Platform module to access the features available in the Product Modules for Employee Engagement and Employee Groups.</p> <table border="1" data-bbox="285 716 1511 1440"> <thead> <tr> <th data-bbox="285 716 889 768">Essential</th> <th data-bbox="889 716 1511 768">Advanced</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 768 889 1440"> <p><i>Platform - Essential</i></p> <ul style="list-style-type: none"> ● 2 total view- and share-only user accounts to Reporting Studio¹ ● Standard out-of-the-box dashboards² ● Single language³ ● Single region ● Single SSO integration ● Cause self-certification ● Cause filters search ● Content streams ● User account creation ● Use user information to segment and target content </td> <td data-bbox="889 768 1511 1440"> <p><i>Platform - Advanced</i></p> <ul style="list-style-type: none"> ● 2 create, edit, share user accounts to Reporting Studio ● 3 view & share-only user accounts to Reporting Studio¹ ● Upgraded: Ability to create your own configured reports ● Upgraded: Multiple languages⁵ ● Upgraded: Multi-regional management⁴ ● Single SSO integration ● Cause self-certification ● Cause filters search ● Content streams ● User account creation ● Use user information to segment and target content </td> </tr> </tbody> </table>		Essential	Advanced	<p><i>Platform - Essential</i></p> <ul style="list-style-type: none"> ● 2 total view- and share-only user accounts to Reporting Studio¹ ● Standard out-of-the-box dashboards² ● Single language³ ● Single region ● Single SSO integration ● Cause self-certification ● Cause filters search ● Content streams ● User account creation ● Use user information to segment and target content 	<p><i>Platform - Advanced</i></p> <ul style="list-style-type: none"> ● 2 create, edit, share user accounts to Reporting Studio ● 3 view & share-only user accounts to Reporting Studio¹ ● Upgraded: Ability to create your own configured reports ● Upgraded: Multiple languages⁵ ● Upgraded: Multi-regional management⁴ ● Single SSO integration ● Cause self-certification ● Cause filters search ● Content streams ● User account creation ● Use user information to segment and target content
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Platform - Employee Groups only	<p><i>Platform - Essential</i></p> <p>For clients who only have the Employee Groups product module, below are the features available:</p> <ul style="list-style-type: none"> ● Access to standard reporting ● Standard out-of-the-box dashboards² ● User account creation (automatic) ● Multiple languages⁵ ● Single SSO integration 	<p><i>Platform - Advanced</i></p> <p>All features noted in Platform - Advanced are available.</p>				
Employee	Employee Groups is Benevity's employee resource group solution that powers					

<p>Groups</p>	<p>culture-building programs and makes it easier for employees to discover, join, create, manage and participate in employee-led groups.</p>	
<p>Grants Management</p>	<p>Essential <i>Employee Groups - Essential</i></p> <ul style="list-style-type: none"> ● Multiple languages⁵ ● Ability to have multiple categories for ERG groups ● Engagement reports ● Discussions ● Event management 	<p>Advanced <i>Employee Groups - Advanced</i></p> <p>Features available in addition to the features in Essential.</p> <ul style="list-style-type: none"> ● Multiple budgets ● Budget expense reporting ● Multiple chapters ● Labels⁶
<p>Grants Management enables companies to access different ways to give back to your community, from in-kind sponsorships to local causes to cross-border grants with external reviewers. Benevity's robust solution can help you streamline and automate the grant application, internal and external review cycles, and send funds using Benevity's disbursement engine.</p> <p>Grants Management does not require a platform subscription and each module is stand-alone.</p>	<p>Essential <i>Grants - Essential (Versaic)</i></p> <ul style="list-style-type: none"> ● Up to 2 programs with standard workflows up to 5 stages, 15 forms, and scoring. ● 1 admin user ● 10 additional users ● Standard budgets - up to 15 ● eSignature with 2 documents and up to 250 envelopes ● In-kind donations⁷ ● SSO ● Single Currency ● 1 submitter portal¹⁵ ● Access to disbursing funds ● Impact Collection & Standard Reporting¹³ 	<p>Advanced <i>Grants - Advanced</i></p> <p>Features available in addition to the features in Essential.</p> <ul style="list-style-type: none"> ● Up to 3 additional programs with complex workflows up to 10 stages. ● Up to 1 additional admin user ● Up to 10 additional users ● Complex budgets ● eSignature with 3 additional documents and unlimited envelopes ● Up to 2 additional submitter portals. Advanced reporting¹³ ● Access to add integrations¹³

	<p><i>Grants - Essential (Benevity Grants)</i></p> <ul style="list-style-type: none"> ● Up to 2 programs with standard workflows up to 5 stages, 15 forms ● 1 admin user ● 10 additional users ● eSignature with 2 documents and up to 250 envelopes ● In-kind donations⁷ ● SSO ● Access to disbursing funds ● Reporting Studio 	
<p>Volunteer</p>	<p>Benevity’s Volunteer management tool enables companies to run in-person or virtual volunteering events, schedule and track hours, and build a community for those who volunteer together. Reward your employees for volunteering using Volunteer Rewards.</p> <hr/> <p>Essential <i>Volunteer - Essential</i></p> <ul style="list-style-type: none"> ● Automated volunteer time tracking ● Private cause created volunteer opportunities - specific to the Client ● Public cause created volunteer opportunities - available to the public ● Volunteer Rewards⁸ ● Volunteer Opportunity archiving ● Cross border volunteering 	
<p>Donate</p>	<p>Benevity’s donation management enables employee donations through payroll or major payment methods, corporate matching, disbursement of donated funds via EFT, and generation of donation documentation for you and your employees. For EFT, we also validate the payment-receiving methods of eligible causes.</p>	

	<p>Essential <i>Donate - Essential</i></p> <ul style="list-style-type: none"> ● Access to disbursing donations ● Single currency giving ● Allocating user credits available in a single currency ● Single budget ● Single localized experience ● Automated matching functionality in single currency ● Apple Pay, Credit Card, PayPal giving ● Single currency corporate donations ● Peer matching ● Single currency seeding ● Match Assurance - AI-assisted match submissions ● User-Created Giving Opportunities ● Volunteer Rewards⁸ ● Internal friendraising ● Cause Filters - matching/rewards ● Political Action Committee Matching (PAC)⁹ ● Cross border donating¹² ● Tax effectiveness in a single country for select applicable donations¹⁰ 	<p>Advanced <i>Donate - Advanced</i></p> <p>Features available in addition to the features in Essential</p> <ul style="list-style-type: none"> ● Payroll giving ● Multi-currency giving ● Allocating user credits available in multiple currencies ● Multiple budgets ● Multiple localized experiences ● Automated matching functionality in multiple currencies ● Corporate and User Gift Cards¹¹ ● Community Impact Portal ● External friendraising ● Cross border donating¹² ● Teams¹³ ● Tax effectiveness in multiple countries for select applicable donations¹⁰
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1 - Reporting Studio is Benevity's reporting and data visualization tool that enables reporting for Donate, Volunteer, and Grants Essential (Benevity Grants). Not available on Versaic.

2 - Standard Dashboards are preset reports that include grouping & filtering capabilities.

3 - Localized experiences enable clients to use currency and language experiences. When implementing, the Benevity Implementations team will recommend best practices to optimize the client's program.

4 - For clients to manage their CSR program in multiple countries.

5 - Languages are provided based on the availability and functionality of the product. When implementing, the Benevity Implementations team will recommend best practices to optimize the client's program.

6 - Labels includes the ability to create labels and label groups to organize and identify Groups and Chapters by a common characteristic, making it easier for employees to find the Groups they want to join

7 - Sponsorships and in-kind donations apply to corporate donations where the donor receives something in return, for example, table tickets at a charity event, corporate advertising in exchange for a donation or any other benefit received in exchange for a donation.

8 - Volunteer Rewards enables Client to reward users when they volunteer at eligible causes. Eligible users receive monetary rewards for approved volunteer work that can be donated to eligible causes. For clients to use the Volunteer Rewards, the client is required to purchase both the Donate and the Volunteer module.

9 - Available for clients, requires additional scoping by the Implementations team.

10 - Tax-effective in select countries where available. Client must enable applicable tax-effective localized experiences. May not be tax effective for all users. For Essential Platform clients, clients' choice of single currency, language and tax effectiveness must be aligned.

11 - Community Impact Portal must be configured for this feature to be available.

12 - Tax-effective in select countries where available. Client must enable applicable tax-effective localized experiences. May not be tax effective for all users. For Essential Platform clients, clients' choice of single currency, language and tax effectiveness must be aligned.

13 - Available for clients, requires additional scoping by the Implementations team, additional fees may apply.

14 - Benevity's Service Descriptions can be found here:

<https://go.benevity.com/hubfs/website/client-and-prospect-files/Benevity-Service-Descriptions.pdf>

15 - Available for clients using Benevity's Versaic Platform

Product Add-ons

Add-on Name	Module Required	Description
Essential Program and workflow (up to 5 stages)	Grants Management	Program that Includes a standard workflow with up to five stages. Includes 1 Admin Account, 10 Users, Max. 5 Forms (1 Primary App Form, 4 Supp. Form), Workflow (up to 5 stages)
Advanced Program and workflow	Grants Management	Includes a complex bi-directional workflow of more than five stages. 1 Admin Account, 10 Users, Max 5 Forms (1 Primary App Form, 4 Supp. Form & Workflow
Grants Management Admin (Pack of 10)	Grants Management	Up to 10 additional administrator users. Access granted to program administrators giving full access to the management interface, including self serve user management. These admin users are the primary contact with Benevity.
Grants Management User (Pack of 10)	Grants Management	Up to 10 additional users. Access granted to general users in the management interface. Permissions can be set up to restrict users from various parts of the review process.
Form	Grants Management	Any additional form for a client's program that can be used as a primary form, nomination form, follow up survey, or scored review.
Submitter Portal	Grants Management	Portal where applicants and grantees can electronically create, submit, and manage their grant applications, reports, and supporting documents throughout the funding lifecycle.
Budgets	Grants Management	Standard: Up to 15 budgets, no in-kind donations. Complex: Multi-budget included, in-kind donations included.
Global Bundle	Grants Management	For international grantmaking programs. Cross border donations in all currently available countries. Up to 10 languages dynamically translated. Tax-effective and local currencies in select countries where available.
External Portal Bundle	Grants Management	For programs that involve requests, tasks or information provided by individuals who are not active users of the system. External Bundle includes: <ul style="list-style-type: none"> • External portal • External portal SSO • Additional form for external portal • External tasks

		<ul style="list-style-type: none"> Up to 20 reviewers
Additional eSignature Envelopes	Grants Management	<p>An eSignature envelope is a document container that you can send to recipients for signature. An envelope may contain one or many document(s) to be signed.</p> <p>All Grants Management clients will receive 120 envelopes per year as a part of their solution.</p>
Workday Integration	Donate or Volunteer	The Workday Integration facilitates the flow of data to provision and deprovision user accounts and to process donations made via payroll via the Donate module. The integration will only provide data to Benevity to the extent explicitly authorized by Client.
Challenges	Donate or Volunteer	Benevity's Challenges functionality enables the Client and users to participate in and measure activities relating to areas such as environmental sustainability, wellbeing, diversity and inclusion or other socially desirable behaviors.
VolunteerMatch by Idealist	Volunteer	Integrated product with VolunteerMatch by Idealist. Allows users to search, browse and discover relevant volunteer opportunities and events.
Data Export MFT	Donate or Volunteer	<p>Standard export of client's data from Benevity Reporting into the Managed File Transfer (MFT) repository using CSV files.</p> <p>These files can be imported into your reporting or business intelligence tools.</p>
Volunteering Catalog	Volunteer	<p>Benevity's volunteering catalog offers access to a growing list of global, in-person and virtual volunteering opportunities sourced and maintained by a dedicated Benevity team. The catalog can be reviewed by the Client and relevant opportunities can be selected and added to the company program by the Client or the end user.</p> <p>Further details about this product are available in the Volunteering Catalog Software and Service Information document.</p>
Data Export API	Donate, Volunteer or Grants Advanced	The Data Export API enables the automated export of specific datasets from the Benevity platform - Grants Advanced and Employee Engagement - allowing clients to seamlessly integrate and analyze their data within their own

		<p>existing BI solutions.</p> <p>The Data Export API provides configurable data output in NDJSON or CSV format. Benevity may, in its sole discretion, make additional data and formats available from time to time and updates may occur quarterly or as otherwise determined by Benevity.</p> <p>Further details about this product are available in the Data Export API Software and Service Information document.</p>
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