Group 03
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Deliverable 1

GROUP NAME: **Group 03**
SCRUM MASTER: Scott Cameron
Name: Scott Cameron
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Group Member	***Skills***	***Role(s)***
Name: Kallie Cothran *Email: kbc92314@uga.edu* *Cell #: 706-844-8264*	*Strengths: Java, HTML, CSS* *Weaknesses: Database Design*	*Primary: Developer* *Secondary: User experience expert*
Name: Jay Badlani *Email: jpb92978@uga.edu* *Cell #: 404-861-5014*	*Strengths: Public Speaking, Interpersonal Communication, Project Management* *Weaknesses: Java*	*Primary: Client Liaison* *Secondary: Business Analyst/Database Expert*
Name: Aqeel Naqawe *Email: asn75095@uga.edu* *Cell #: 770-728-3175*	*Strengths: SQL, Database, Java, Presenting* *Weaknesses: Organization*	*Primary: Database Expert* *Secondary: Developer*
Name: Scott Cameron *Email: swc83821@uga.edu* *Cell #: 770-6241233*	*Strengths: Project Management, Interpersonal Communication, Organization, Presenting* *Weaknesses: Java*	*Primary: SCRUM Master* *Secondary: Client Liaison*
Name: Jesse Eldell *Email: jte30124@uga.edu* *Cell #: 678-849-7631*	*Strengths: SQL, Java, HTML, CSS, Organization, Presenting* *Weaknesses: None*	*Primary: User experience expert* *Secondary: Database Expert*
Name: Willie Willians *Email: ww15607@uga.edu* *Cell #: 404-438-9843*	*Strengths: Project Management* *Weaknesses: Java*	*Primary: Business Analyst* *Secondary: Client Liaison*

TEAM STRENGTHS: Diverse skills, respect for one another, technically well versed, flexible
TEAM WEAKNESSES: Organization & communication

MIST 4620S: Systems Project Team Contract

Spring 2020

Aqeel Naqwe, Jay Badlani, Kallie Cothran, Willie Williams, Jesse Eldell, Scott Cameron

Team Meeting Place/Time:
Casey Commons, Mondays, 6:00 pm

Component Leadership:

SCRUM Master: Scott Cameron

- As the SCRUM master, I will be ensuring all members are aware and effectively understanding the SCRUM values, act as the team leader during group meetings, and submit all team deliverables in the appropriate fashion.
- As the Secondary Client Liaison, I plan to act as additional support in communication with the client, and help with the translation of SCRUM principles to the client, as the Team SCRUM Master
- If needed, I will help with the development of our product and possibly in the Database division as well.

Client Liaison: Jay Badlani

- As the client liaison: Facilitate communication between the client and the team, deliver client expectations and team progress on a regular basis and answer all of the client's needs at a moment's notice while maintaining a dialogue with the team.
- As secondary business analyst: Support the collection and communication of requirements into a functional system.
- If needed: Help Developers.

Database Expert: Aqeel Naqwe

- As Primary database expert, I will be in charge of creating data models, creating data tables, and populating the database
- As Secondary developer, I will help the primary developer with any extra work needed to be done with programming and any extra technical issues within the project
- If needed, I will help with the business analysis of the problem

Developer: Kallie Cothran

- As a primary developer, I will take charge of creating a system that meets our client's specifications and testing it at each phase to ensure high quality.
- As a secondary user experience expert, I will monitor the system's ease of use and appearance to make sure it pleases the client's eye and is easy to use.
- If needed, I will help the SCRUM master facilitate communications and ensure that deliverables are submitted correctly and on time.

Business Analyst:

- As a primary Business analyst, I will interact with business stakeholders, analyze documents as well as business problems
- As secondary Client Liaison, I will be in constant contact with the client and make sure deliverables reach the client party.
- If needed I can assist the Development team as a floater for tasks that may need to be completed.

User Experience Expert: Jesse Eldell

- As a User Experience Expert, I will monitor the system's ease of use and appearance to make sure it pleases the client's eye and is easy to use.
- As a secondary database expert, I will help the primary developer and database expert with any extra work needed to be done with programming and any extra technical issues within the project
- If needed, I will help with the Business Analysis of the program

What is our Team's Mission?

Our team's mission is to provide a high-quality product to our client in a timely manner, using the methodologies taught in this class and other past MIS department classes. We intend to utilize the SCRUM principles taught in this course and produce a product that will exceed the expectations of our client.

SCRUM Ceremony Structure:

<u>Daily SCRUM: Bi-weekly 20 minute meeting</u>

- 12 minutes: Each team member goes any tasks assigned and completed
    - Explain what they have completed
    - Explain what they need to complete

    - Explain how they intend to complete any impediments
- 5 minutes: Team members give each other advice on how to move forward on the tasks any other member has issues with
- 3 minutes: Any questions team members may have about the tasks or issues they run into

Sprint Review: Weekly 45 minute meeting

- 30 minutes: Each team member will spend about 5 minutes updating the team on these matters:
    - What tasks I completed and/or worked on during the previous week
    - What tasks I did not complete
    - How those tasks affect the Product Backlog
- 15 minutes: The team will adjust the Product Backlog by deciding tasks that should be added or removed and the remaining tasks' importance.

Sprint Retrospective: Weekly 45 minute meeting

- 40 minutes: Each Team member discusses the tasks completed since the last meeting, whether or not they were completed effectively, and how the task completion process can be improved for the future.
- 5 minutes: Each group member addresses what they will do differently to improve the task completion process individually.

Code of Conduct:

Pre-Meeting

We prepare for meetings by having all materials organized, everyone is up to date with the coursework and content for each section of the project and class. Take notes of what was accomplished, set goals for the next meeting, make sure no schedule conflicts appear and deal with any problems.

Meeting Behaviors

"On Time" for our group means to be at the location of the meeting within 5 minutes of the chosen time unless otherwise agreed upon exceptions. Behaviors that should be encouraged are good communication of problems, questions, and what each member needs to do. Members should be timely and have all their work done in a timely manner and respect all other members' time and experience. Behaviors that should be avoided are altercations between members as well as tardiness and procrastination and wasting of time during the meetings.

Post-Meeting

The Scrum master will attempt to overcome any obstacles team members may have presented. Evidence that this norm is being followed will be that the Scrum master notifies the member that presented the issue and will confirm that it is resolved.Team members will make a list of their tasks for the week, and evidence of this will be shown by each member sending their list in our GroupMe.

Conflicts and Expectations

If any responsibilities need to be taken over, the Scrum master will take the responsibilities unless another member chooses to. If one of the team members lets the others down, the professor will be notified of any major issues and the scrum master will talk to the person who let the team down.

When the ground rules are broken, the scrum master, or the secondary scrum master if the scrum master is the one who breaks the rules, will notify the professor and will give a verbal warning to the one who broke the rules. For any exceptions, the group will come to an agreement whether this exception is allowed and if the exception is excused and if any responsibilities need to be taken over, the Scrum master will take the responsibilities unless another member chooses to.

The scrum master will be notified if any member has a problem with another member or any other issues that arise within the group. The scrum master will be the intermediary between the two parties in conflict. If any member has a problem with the scrum master, then the members who have an issue will ask for another member within the group to be the intermediary in the conflict and the scrum master will have to confirm of the assigned facilitator member.

Team Signatures

Aqeel Naqawe 1/20/20
Kallie Cothran 1/20/20
Jay Badlani 1/20/20
Jesse Eldell 1/20/20
Scott Cameron 1/20/20
Willie Williams 1/20/20

Client Questions:

Issues:

- What are some barriers that you foresee with this project?
- What are the project's biggest drawbacks?
- What do you think contributes to these drawbacks?
- How would you prioritize the issues you are currently facing with DonorView from most urgent to least?

Expectations:

- What are your expectations for this project?
- What is your definition of "Done"?
- Were the FAQs for DonorView helpful?
- What are we NOT delivering in this product?
- Who is our audience?

Functions:

- Is there a prototype already out there for this project?
- How do you want auto-completion to work in terms of what data is relevant and such
- Overall, how does the process of getting donations work?
- When aggregating constituents that share emails, should they only be included in the joint account or should their individual accounts be retained?
- Of all the functional areas listed, which are the most prominent/important to the current system?
- What is the current workflow of the Habitat Constituent Tracking process?
- Do you have your own personal testers at Athens Area Habitat for Humanity?

Report Generating

- What kind of reports are you trying to generate?
- What is the purpose of these reports?

Salesforce CRM Notes Prelim [1/28/20]

- Local nonprofit
  - Limited to spending in non-profit areas
  - Have to maintain a certain percentage of expenditure to admission
- Two different spaces
  - Lots of constituents to keep in balance
- Donorview
  - Minimum viable product
  - Haven't been able to get on top of that wave
- Make sure data hygiene is where it is needed to be, have a smaller team
- A system that one or two people can handle effectively
- Workflows
  - Core data set →
    - Entering a new constituent

            - User control or admin control
        - Update
            - Admin updates info
        - Merge
            - Control how all of the fields map over
            - Takes key fields and determines what's important
            - Merge different records of the same person
        - Purge
            - Eliminate unmailable addresses
            - Get some badge functions
        - Auto-completion of fields
    - Assignment of definitive roles
    - Segmentation
- Basic model
    - Mortgages without interest
        - Keep it around 30% of income
    - Help disabled not get shut-in
    - **STABILITY OF HOUSING**
    - Build wealth and equity through housing
    - Get in touch with donors and manage relationships
- Data is input by users via event or fund drive
    - Pages which are filled up by users
    - New user constituents entered in 3 times a week
    - 10 a day after new system going on
- Donor Label
    - VIP→ a role in approving a particular area [schools]
        - If you have a dedication, you want the representative of that area
- Weak householding function
    - Different types of messaging going on
    - Need to group donors better
    - Jane donates every year, then John comes in etc. Jane is more consistent
    - UNDERSTAND WHO WE ARE TALKING TO
- System populated fields don't update
    - Trying to update existing fields
- Reporting
    - Track patterns of engagement
- Definition of Done
    - Dummy data that we provided with full view linked with other modules
    - As many problems fixed as we can
        - Tee'd in with financial and email
- Accessibility
    - Marketing Director
        - Concerned with large & small donors

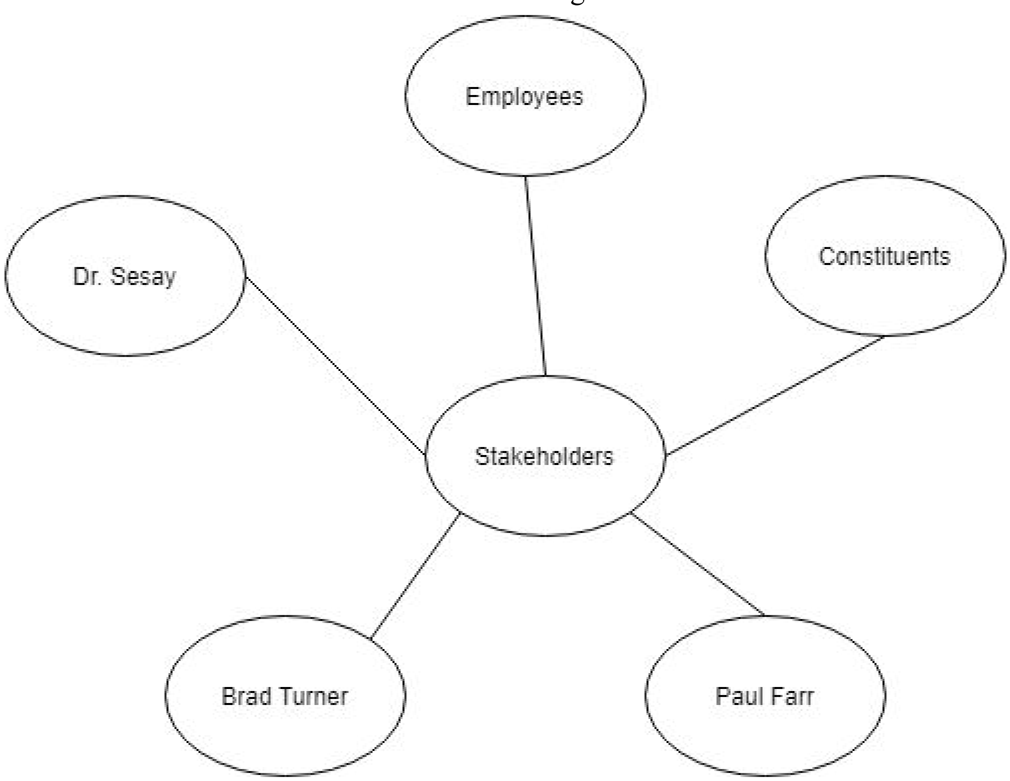
  - Developing Director
    - Concerned with large donors
  - Outreach Director
    - Concerned with tracking hours and organizing events
  - Execute Director & Board Member
    - Not power users but give an eagle-eye view
- How much they gave last calendar year, last fiscal year
  - Frequent vs non-frequent donor
  - Filtering options
- Not going to be any information that needs to be firewalled off
  - Renters and Buyers are on separate systems
  - Admin functions with lots of damage vs regular users with only a little bit of damage

DELIVERABLE 2

System Overview

Client Organization Background: (1-2 pages)

- a. Description of Organization: What organization/department is the system developed for? Briefly provide a short overview of this organization/department. Also provide your client's contact information (name, title, email).
- This system is developed for Athens Area Habitat for Humanity to transfer their CRM data and functionality from DonorView to Salesforce. Habitat for Humanity provides Affordable housing solutions to lower income families in Athens. They have many volunteer, donor, and vendor data that they use to contact and keep in touch with all these constituents, and they have a Constituent Relationship Management software to keep track of all of the information from these constituents. The Constituent Relationship Management software is less than optimal and they want a software they can provide a better solution to their CRM. Many different constituents need to be tracked from their volunteers and their hours put in, to the donors and sponsors contact information as well as transaction history. DonorView costs $4,000 a year which could be used to fund more missions for Habitat, whereas Salesforce is free for nonprofits. Salesforce costs $30,000 for a custom software so Habitat is coming to UGA students for help making a custom solution for them.
- Client Contact: Paul Farr, Direct for Marketing and ReStore Operations, paul@athenshabitat.com
- b. Stakeholders - Draw a stakeholder context diagram



- The stakeholders for Habitat would be Project Owner/Sponsor - they are the head of the specific ongoing project and are responsible for the outcome of the project. Employees/Workers - these are the people that are directly involved in the process and have most of the work to do. Donors - their money directly impacts the outcome of what Habitat does, without them then Habitat cannot run. Clients - these are the individuals that are being helped through Habitat and have a direct stake because without Habitat then it will be hard to find affordable housing. Vendors - these are the organizations that Habitat are buying

- c. Users:
  - Donors/Sponsors, VIPs, Constituents, Volunteers, Vendors, Event Participants
- The Users will be John Smith, an employee of Habitat for Humanity that uses constituent information to reach out. Robert Strong is a volunteer for Habitat and wants to keep track of his hours and events as well as keeping in touch with employees.

User	John Smith (Employee)	Robert Strong (Volunteer)
Characteristics	John is an employee of Habitat and he knows all the processes of DonorView and how to contact and keep track of constituents. He wants to have all constituent information in one place and ease of contact.	Robert is a volunteer for Habitat so he does not know all the operations of Habitat and DonorView. He does not have access to all records, only his and employees to contact. He is a student so he is busy with school and does not have time to try to learn everything about DonorView.
Goal	John wants to have a central software system that has all constituent information in one form, where he can easily call or email anyone he needs to as well as find any donor transaction	Robert wants easy and fast access to volunteer, event, and employee information as well as a fast way to see his volunteer hours and clock them. He wants the software to be easy to use, simple, and

	information or volunteer hours.	straightforward.
Likes	John likes to easily contact any constituents and have all their information on hand so that he can easily reach out to them. He wants all the volunteer information in one place so that if volunteers want their information or if he needs it, he has ease of access.	Robert likes to be able to see all upcoming event information and employee contact information in one place, as well as signing up and in for events.
Dislikes	John dislikes having constituent information across different platforms and having to search around for their contact information. He doesn't want to waste time on finding constituent information when he can be working to get constituent help.	Robert dislikes having to look around different websites and emails in order to find out event details such as location and time and how to sign up because he does not have the time.

System Vision Document (1-2 pages – see p13 of the textbook (Satzinger et al.) for an example)

- a. Problem Description (provide a description of the problem/opportunity the project approvers find compelling; then describe how your solution will address the issue)
- b. System Capabilities
- c. Business Benefits

Problem Description:

Athens Area Habitat for Humanity currently uses DonorView CRM to keep track of all of their constituent data and information pertinent to the maintenance of customer relationships which currently cannot serve at an optimal level given the many limitations of a relatively inexpensive piece of software. Though it is the most organized system to date, the costs are significant enough to warrant a change, one that could divert the costs of the systems towards the cause of the organization. Currently the system does not allow making connections among constituents making it difficult to keep track of customer hierarchy. Another large setback is the small number of fields in conjunction with the search function, only one per search, or a search across all fields. The absence of these basic functions are very costly in terms of time and effort given the non-profit nature of the organization and the thin spreading of HH resources. Accessing data quickly is essential to the growth and impact of a firm. The current expenditures for their current system sum up to over $4,000 which is hardly worth the difficulties associated with it.

Our solutions are oriented towards making the user experience by creating a new Salesforce platform with all of the essential functionalities that are currently absent from the current one. Information shouldn't be difficult to access especially given the growth of the organization. The system will streamline all data so when new data is entered it'll be welcomed and integrated in a smooth fashion with minimal headache.

System Capabilities:

The system should be capable of:

· Including and exercising a broader range of search/filtering functions

· Creating a network of relationships among several data profiles

· Importing data sets without error in the case of duplicated and new data fields

· Include constituent ID, the primary key, in canned exports in order to align records across spreadsheets

· Handling large amounts of input data and deletion

Business Benefits

The development of this system will enhance the process of tracking constituent data as well as information pertinent to customer relations. Business Benefits from this system includes:

1. Simplifying the customer tracking hierarchy by allowing connections to be made amongst constituents.
2. Increasing the number of fields in conjunction with increasing the search capabilities of the system (filtering results). This would allow for more fluent and accurate results from a search. Currently, the number of fields is small and this causes a setback to the system as a whole.

Conditions of Satisfaction (Definition of "Done")

Business Benefit 1 will be attained when the following conditions are met:

- Time spent tracking constituent hierarchy is reduced by 60%.
- Time spent updating information is reduced by 20%.
- Inaccuracies in donor tracking is reduced to 0%.
- Time spent accessing data will decrease by 25%.

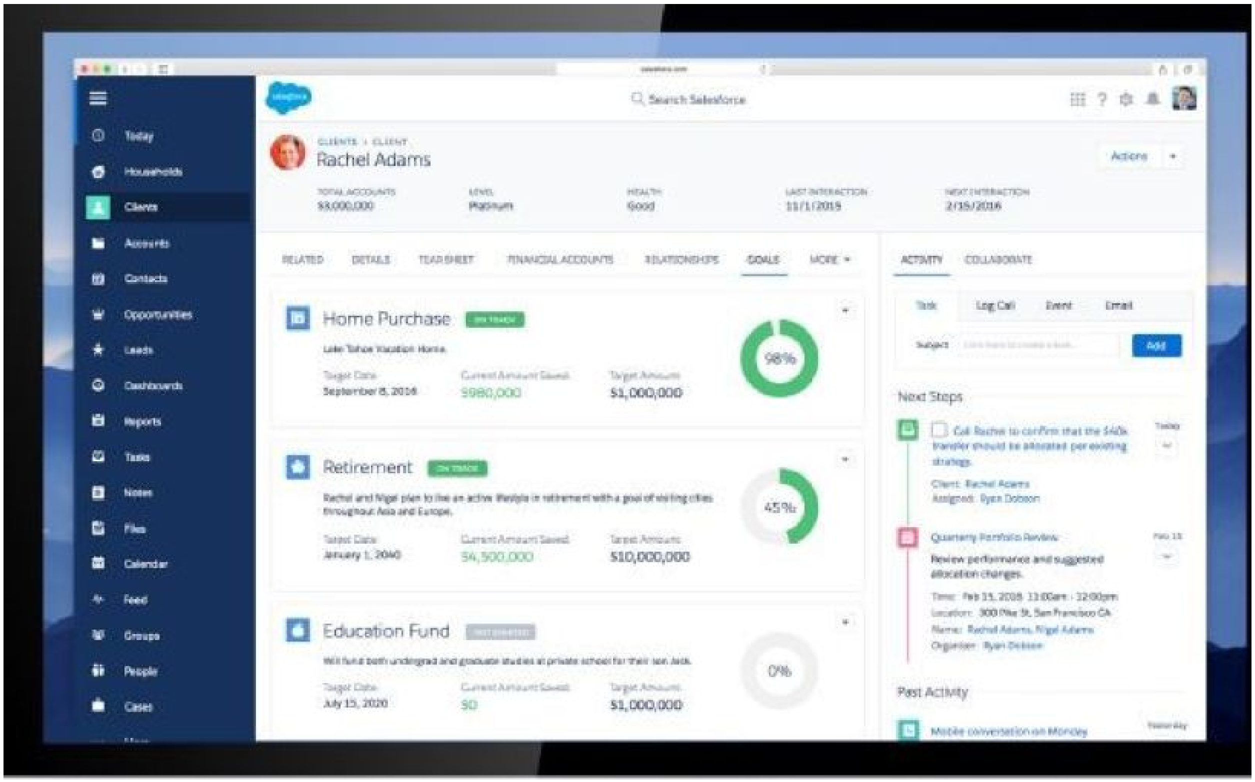
Business Benefit 2 will be attained when the following conditions are met:

- Search capabilities have filtering functions that allow for precise results.
- Time spent on searching for constituents will decrease by 10%.

Product-Box Vision

Front of Box

Name: Constituent Tracking & Outreach Application



Key Selling Points:

- Improved understanding of constituent relations
- Improved ability to update fields
- Useful, customized reports
- Batch update/deletion functions
- Auto-completion based on relevant data

Back of Box:

Product Description: The goal of this system is to provide an easy to understand platform for Habitat for Humanity employees to better understand their constituents and how to reach them by creating Salesforce entities to track who their constituents are and store information about how/when they volunteer and donate in order to improve their communication.

Features List:

- Create customized reports to understand individual and group patterns
- Automatically apply updates to all relevant fields
- Householding function to allow groupings of constituents
- Ability to import, update and delete multiple records simultaneously
- Automatically populate certain fields based on other criteria

Operating Requirements:

- Access to a web browser on any device

Elevator Pitch

For Athens Area Habitat for Humanity staff
Who need an improved constituent management system with an easy-to-update platform and clear visualizations of constituent relations and behaviors
The Constituent Tracking & Outreach Application is a constituent management suite

That allows for batch data import and deletion; automatically updates certain fields while still offering manual updates; includes the ability to group individuals; can automatically generate reports based on individual or group data, and is compatible with their other systems.
Unlike their current use of DonorView to track constituent information
Our Product reduces information editing limitations, simplifies data interpretation, and provides useful reports.

Feasibility Analysis (no page limit)

- a. Technical Feasibility (Assess the four areas on the tech feasibility slide (e.g., familiarity with technology, familiarity with business domain, size of the project, integration with other systems)
    - Familiarity of Technology
        - The technology is going to be made on a low coding platform, which will require little knowledge of coding and programming. As long as the developers and users

involved have an insight on how the platform Salesforce works then organizing the data and extracting relevant information will be feasible.

- Familiarity with Business Domain
  - People who are familiar with the workflows of Athens Area Habitat will have an easy time working with the product. Most users of the product have a pretty good understanding of how the process works when it comes to CRM implementation.
- Size of the project
  - The size of the project is based on the scope that the product owner and customer provides to the team. Based on the information given the size of the project seems like a large project that can be broken down into a series of simple components. Because of the large project size, there will be enough efficiency and features for the product to be "done".
- Integration with our systems
  - We will test the functionality of our product using dummy data sets provided by the customer. When our product features correlate with the wants and needs of the customer, the customer will be able to efficiently integrate our salesforce coding system with the data sets that they have for an efficient workspace and more productive with Athens Area for Habitat.

- b. Organizational Feasibility (Is the system going to be used? Do the users have a reason to resist or not to use the system? What can you do about it?)
  - Athens Area Habitat for Humanity is currently using a CRM system called DonorView, a prebuilt system that lacks the customization tools needed for a specific non-profit such as AAHFH. By switching over to Salesforce, we can create a CRM that can cater to their needs, such as being able to import batch data without cost and organizing household donor data more efficiently while avoiding duplicates.
  - The reasons for resistance are pretty simple. First, there is weak householding functionality which doesn't allow data to be aggregated for constituents. Another reason is that DonorView comes with a predetermined list of fields that are built into the system, and AAHFH is unable to edit those fields. Other problems include an inability to batch-deleting or batch-importing records, an inability to create data-dependent fields, and limited search functionality
  - There are numerous solutions that are available to solve these issues, but how we will go about following some of these solutions is determined by the product owner's approval. We want to make sure that we stay within the scope of the project in order to encompass the necessary functionality and get the job "done."
- c. Economic Feasibility
  - No additional purchases will be required for Athens Area Habitat for Humanity to utilize the CRM that we will be developing. We will not be working with a budget of any kind, so economic feasibility is extremely high.
- d. Schedule Feasibility
  - As planned out by Dr. Sesay, there are 8 separate deliverables that efficiently portion out this project. After analyzing each deliverable's elements and requirements, we were able to determine that each currently has a high feasibility rate. These deliverables will be

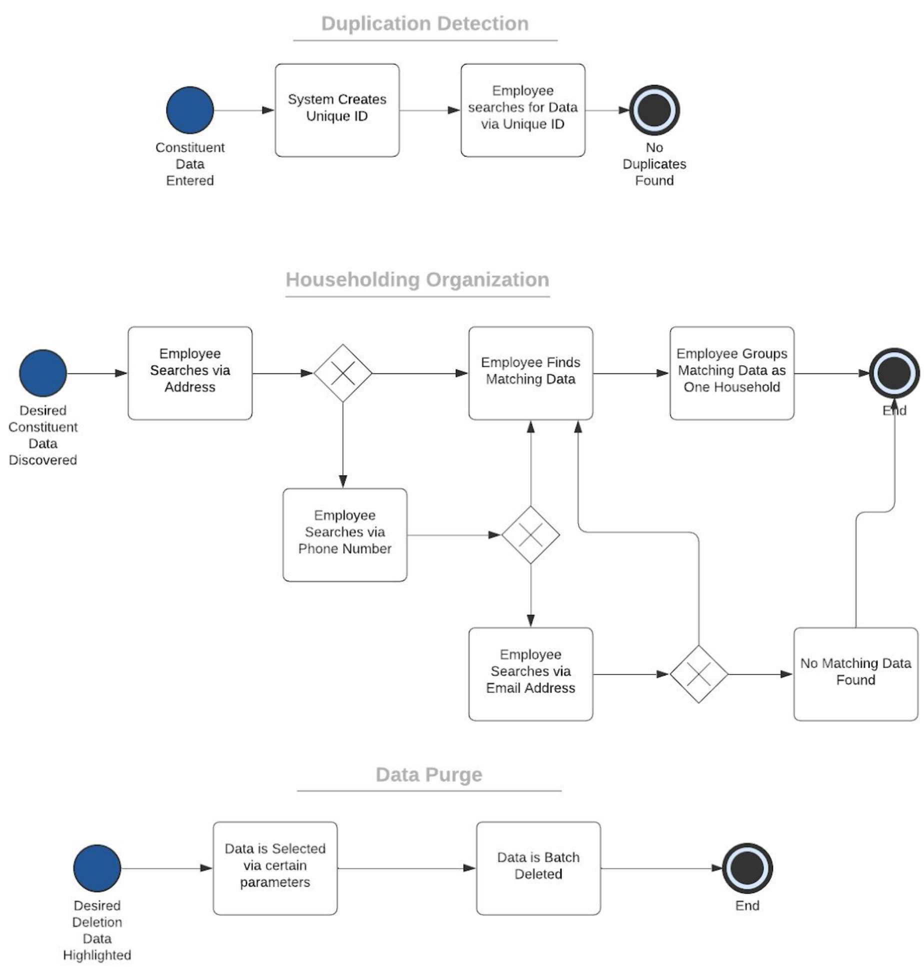
successfully completed and turned in on time. We will be utilizing Agile and assigning work to ourselves that we are comfortable completing on our own time with our diverse skill sets. Each of our team members has prior experience working on large tech-oriented projects such as this one and we are confident that we can schedule out our time efficiently to complete what is asked for by the client.

DELIVERABLE 3

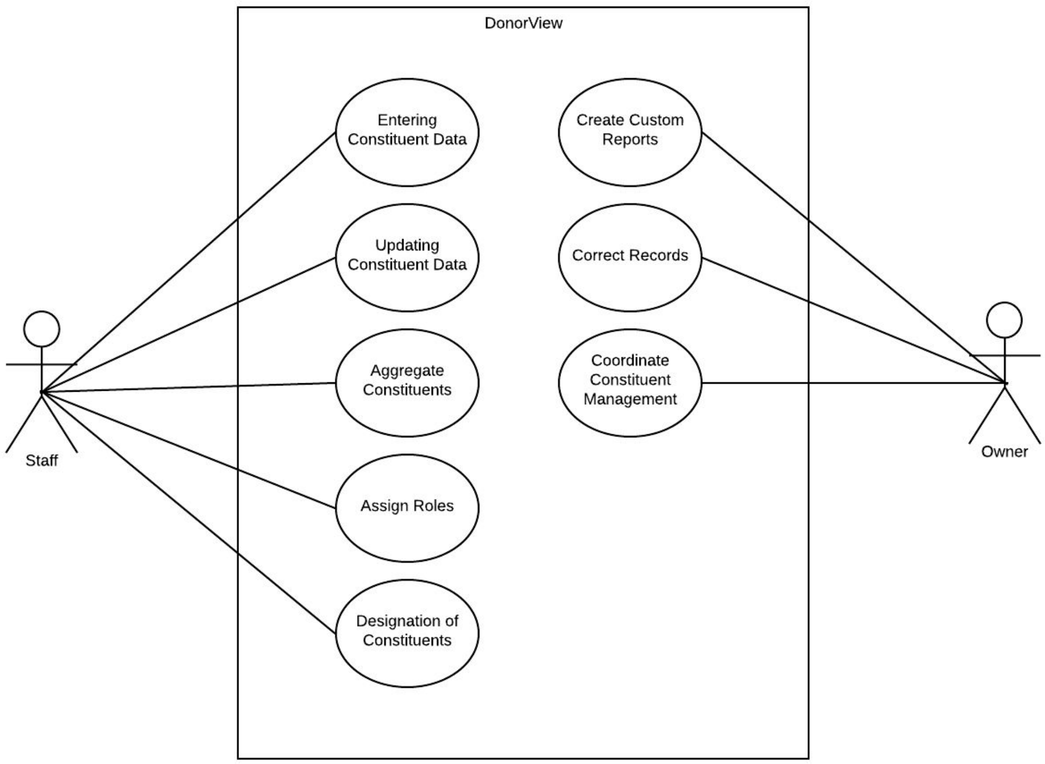
Information Gathering Techniques

Information Gathering Techniques (Finished, adding after downloading due to formatting issues)

Process Mapping



Use Case Diagram

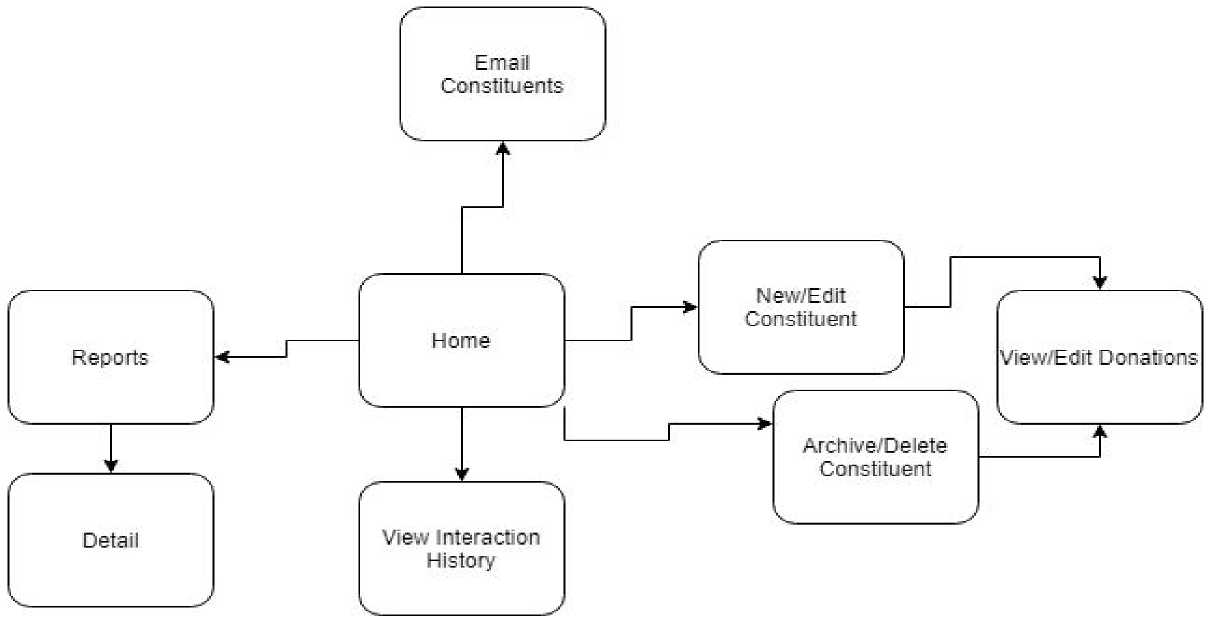


Use Case Descriptions

Use Case	Description	Actor
Entering Constituent Data	Staff enters any relevant constituent data for processing constituent information	Staff
Updating Constituent Data	Staff updates any incorrect data or outdated constituent information	Staff
Aggregate Constituents	Staff will aggregate constituents based on communication purposes	Staff
Assign Roles	Staff will assign multiple roles for constituents based upon their role	Staff
Designation of Constituents	Staff will designate constituents based on their current status	Staff

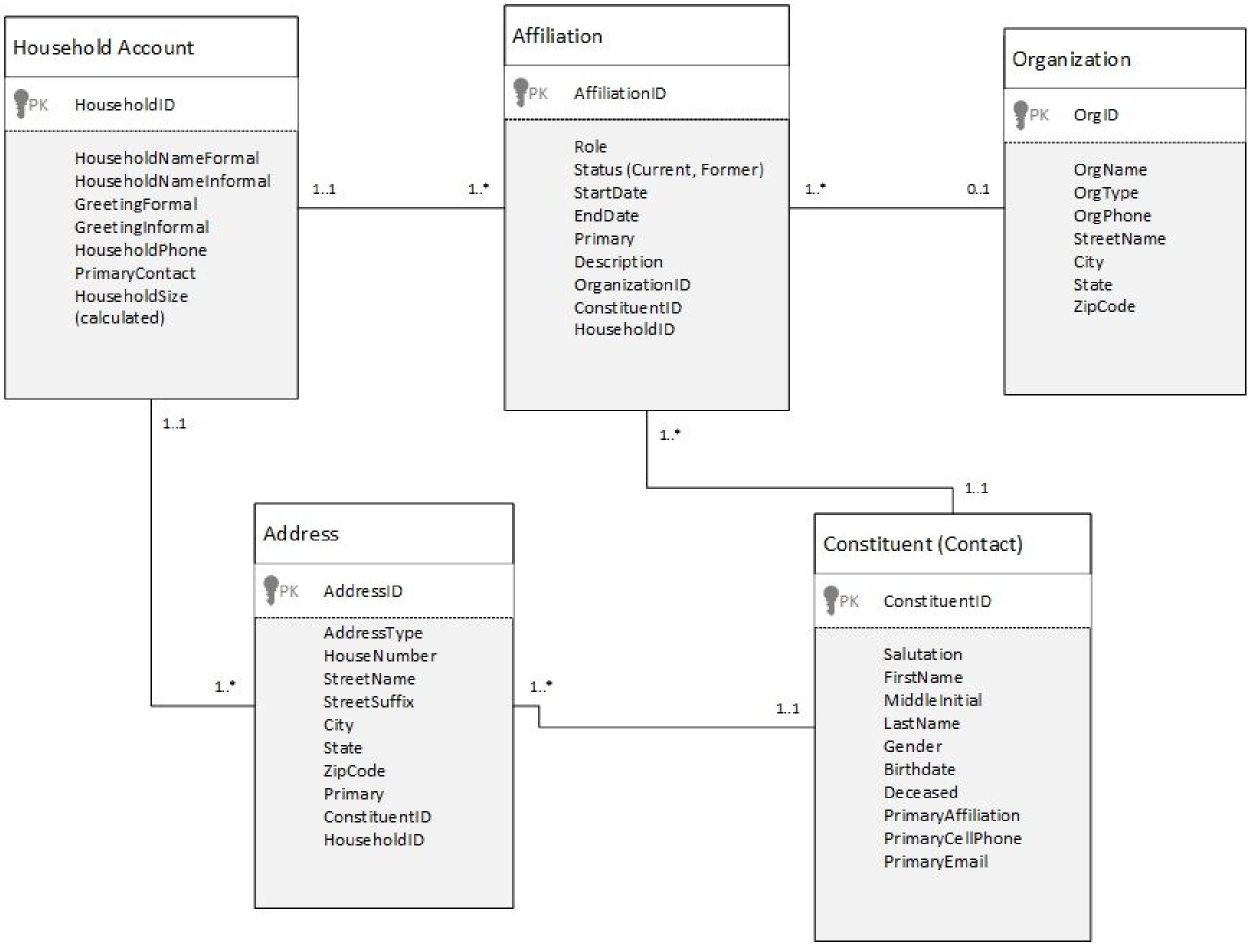
Create Custom Reports	Owner will be able to create custom reports using calculations	Owner
Correct Records	Owner will be able to review and correct/update any incorrect or outdated record	Owner
Coordinate Constituent Management	Owner will have the ability to coordinate constituent management of events, emails, donations, etc.	Owner

User Interface View


Email Constituents
New/Edit Constituent
Reports
Home
View/Edit Donations
Archive/Delete Constituent
Detail
View Interaction History

Domain Class Diagram

DOMAIN CLASS DIAGRAM
ATHENS AREA HABITAT FOR HUMANITY—CONSTITUENT OUTREACH & TRACKING APPLICATION



CRUD Matrix

Use Case	Constituent	Company	Document	Roles	Transaction
Entering Constituent Data	C	C			
Updating Constituent Data	UD	UD	UD		
Aggregate Constituents	RU	RU			
Assign Roles	RU	RU		CRU	
Designation Of Constituents	R			UD	
Create Custom Reports	R	R			
Correct Records	RUD	RUD			CRU

Coordinate Constituent Management		**CRUD**			

Non-Functionality Requirements

- Usability Requirements
  - Ease of Access and User Interface: providing a user-friendly system with numerous resources to use when issues occur and provides an exceptional user interface with the functions that the client requires.
  - Documentation: The ability to log all of the constituent data is possible using Salesforce.
- Reliability Requirements
  - Recovery and Detection: Has fully functional recovery abilities and is able to detect lost data in the situation of a system crash.
- Performance Requirements
  - Allow multiple users online at once, manipulating data and having a responsive and efficient program.
- Security Requirements
  - Having the possibility to limit the access of certain elements and objects to only those roles who need to access them, thus limiting any security threats to personal constituent data/financial data.
- Implementation Requirements
  - The ability to create visuals representing the client data.

    - Creating a process model of the new processes being implemented.
    - Creating a data model that represents the client's overall database.
- Interface Requirements
    - Must interact/function with client data.
- Physical Requirements:
    - Server: A functional server that is able to store all of the constituent data.
    - Hard Drive: A fully functional hard drive that is able to store the program.
- Support Requirements
    - Salesforce is a program that is fed constant updates in order to have a fully supported program and ensures maximum efficiency for the client.

Revised Feasibility Analysis

After close consideration with the identified use cases and domain class diagram, we will continue to reference the feasibility elements from deliverable 2.

Glossary

- Clients: Individuals that will directly benefit from our Salesforce CRM implementation
    - Clients would be the employees and executives from Athens Area Habitat for Humanity
- Constituent: Individuals or companies that support AAHFH and its affiliates
    - Constituents are categorized by the system of names and terms given to us by the Product Owner and Clients
    - Some examples of Constituents are considered as the following:
        - Donors & Sponsors
        - Volunteers
        - Vendors
        - Event participants
        - VIPs [Very Important People]
- Nomenclature: A set of rules for naming constituents in accordance with non-profit fundraising standards
    - When it comes to developing naming rules, they need to stay consistent throughout the implementation
    - A bank of salutation prefixes and suffixes were provided by AAHFH. The clients require that we incorporate this into the MSCW list under Must-Haves, 2b. Also, AAHFH has provided an order list and special rules for each of the three main types of salutation use cases. The rules and data bank was adapted from Middlebury State University's style guide found at the following link: https://mediawiki.middlebury.edu/LIS/Name_Standards
- Constituent Management System (CMS) : The combination of people, processes, and technology used to deliver superior service to the constituent. A typical system will give your organization the ability to: Manage members: including member signups, database management, and analysis.
    - Our Constituent Management System will include some of the following features:
        - Entry and updating of constituent information

        - Auto-completion of fields according to relevant data, e.g. “in service area” based on “county” & “state” fields
        - Assignment of multiple roles to constituents, e.g. donor, volunteer, vendor, VIP, etc.
        - Associate individuals with documents
        - Designation of constituents as anonymous givers or deceased
        - Designation of board members (past and present) and their roles
        - Designation of email and postal mail preferences/requirements (e.g. Do not mail, Do not solicit), and mailability (e.g., Missing unit number, Address unconfirmed, etc.)
        - Flag records of minors so we do not mail/email them
        - Assignment of comments and notes
        - Assignment of relevant salutations such as by first name, by last name and title, by full name, and last name first (for alphabetical lists)
- Constituent Interaction History : A log to see how your constituents engage and interact with your organization, and how to communicate with them most effectively
    - We want to show that constituents were emailed and t show if the email was opened or responded to
- Householding: the management or occupation of a house or tenement.
    - In our CMS, we will use householding to aggregate constituents for purposes of communication (e.g. direct mail campaigns) and assessing donor value
- Email Campaign: A coordinated set of individual email messages that are deployed across a specific period of time with one specific purpose, such as download a white paper, sign up for a webinar, or make a purchase with a provided coupon.
- Activities: The condition in which things are happening or being done. Examples include the following: Financial donations and pledges, in-kind donations (e.g. to thrift stores), event participation, email campaigns, mail merge (e.g. thank-you letters, end-of-year statements)

Deliverable 4

Non- Functional User Stories:

1. Create Database schema (Must Have)
2. Configure Salesforce Website (Must Have)
3. Learn to generate reports w/ filters in Salesforce (Must Have)
4. Implement data recovery system (Should Have)
5. Implement data security system (Should Have)
6. Learn how to print mailing labels (Should Have)

7. Learn how to create community pages (Should Have)
8. Create Visual representation of client data (Should have)
9. Customize Website Design (Could Have)

Use Stories	**Description**	**Actor**
Set up Salesforce Website	The Development Team sets up the Salesforce website the project will be based on.	Development Team
Create DataBase Schema	The Dev Team creates a schema for the database to organize where all of the data will be stored on the website.	Development Team
Manage Constituents	Staff creates, updates, or deletes Constituents.	Staff
Manage HouseHold Account	Staff creates, updates, or deletes household accounts.	Staff
Learn how to generate reports with filters in Salesforce	Dev Team learns a new Salesforce skill to apply to the project using Trailmix.	Development Team
Manage Organization	Staff creates, updates, or deletes organizations.	Staff
Manage Affiliation	Staff creates, updates, or deletes affiliations.	Staff
Generate Constituent	Staff requests to print a	Staff

Report	report of constituents, it is then compiled by the system and printed.	
Generate HouseHold Report	Staff requests to print a report of households, it is then compiled by the system and printed.	Staff
Manage Address	Staff creates, updates, or deletes addresses.	Staff
Generate Organization Report	Staff requests to print a report of organizations, it is then compiled by the system and printed.	Staff
Learn how to create community pages	Dev Team learns a new Salesforce skill to apply to the project using Trailmix.	Development Team
Manage Constituent through Community	Staff manipulates constituent data through a community page.	Staff
Learn how to print mailing labels	Dev Team learns a new Salesforce skill to apply to the project using Trailmix.	Development Team
Generate Household Mailing Label	Mailing labels are created by accessing household data.	Staff

Use Case Name:	Manage Constituent
Scenario:	
Triggering Event:	An individual or organization makes a contribution to AAHFH
Brief Description:	An employee wants to add a constituent to the system. First,the employee will search for the constituent system to check to see if there is already a constituent with the same information. If an employee searches for the constituent and they are in the system, then the system will identify that there are duplicate constituents. If there isn't a duplicate, then the employee will be able to add the constituent and populate the appropriate information. If there is new information presented about a donor, then the employee will search for the constituent and add the appropriate updates within the system. If a donor had passed away or is no longer donation for a certain period of time, then the employee will count them as an inactive donor and can remove them from the system.
Actors:	System, Employee
Related Use Cases:	Manage Household, Manage Affiliation
Stakeholders:	Constituent, Brad Turner, Paul Farrer, AAHFH Employee
Preconditions:	There had to have been a donation by the constituent at some point in time
Postconditions:	Once the donation is processed and the constituent is added, then the employee must be able to add the constituent to a particular household.

<table>
<tr><td><u>Flow of Activities:</u></td><td>
<table>
<tr><th><u>Actor</u></th><th><u>System</u></th></tr>
<tr><td>
1. Employee types in the name of a constituent
2. Employee cannot find the constituent
3. Employee finds the name of the constituent and clicks on the name of the constituent and fills in the necessary information
4. Employee clicks on save to store the information
5. Employee searches for a constituent and selects to remove the constituent
</td><td>
1.1 The system searches for the name of the constituent

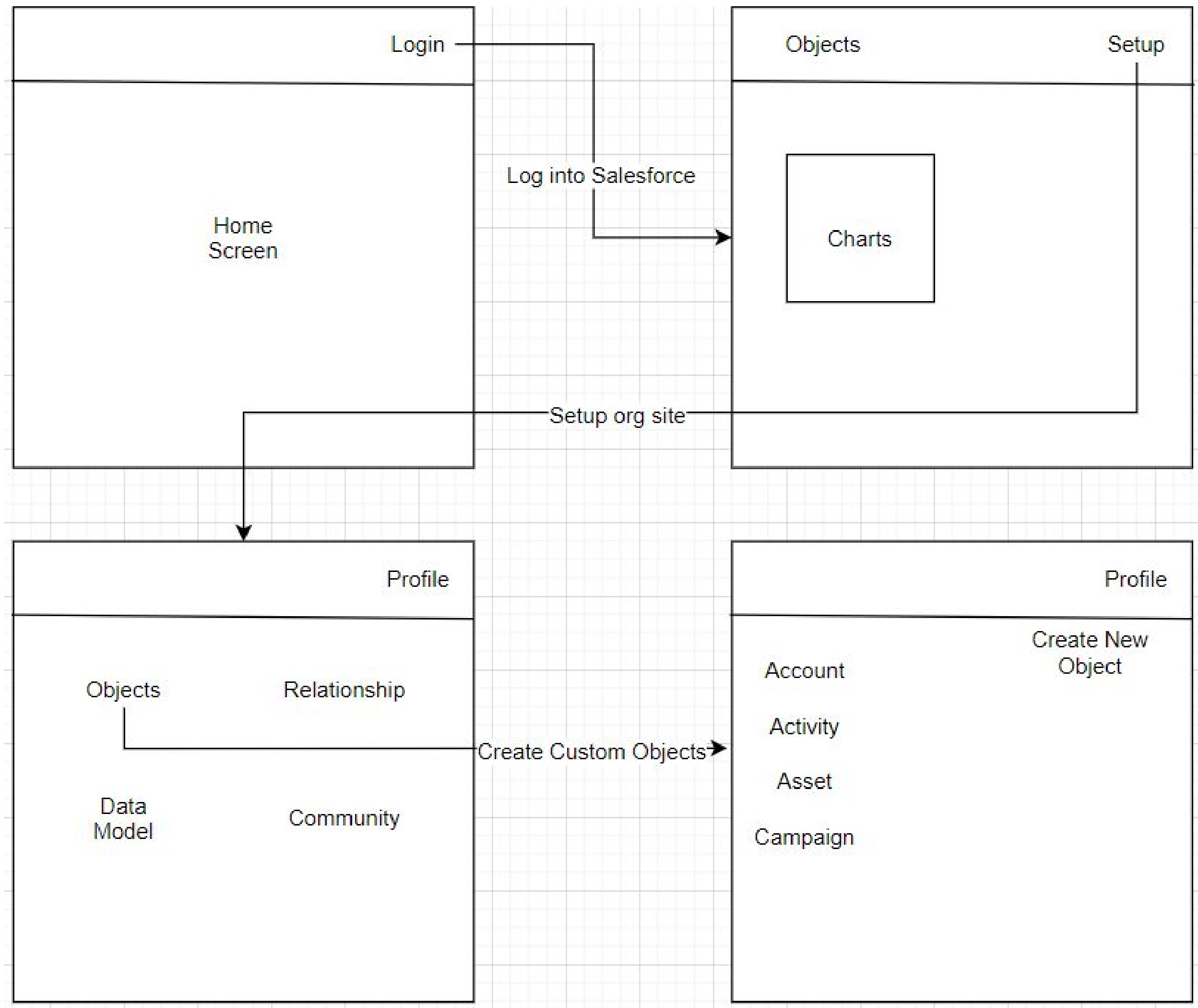
2.1 If the constituent is not already in the system, then it will prompt the user to add them

3.1 If the constituent is in the system, the system will show them and allow the employee to make any updates.

4.1 The system holds in the updated/new information inputted for the admin; The constituent data is stored into the system

5.1 The system prompts the user to confirm the deletion; When the user clicks yes, the constituent is removed
</td></tr>
</table>
</td></tr>
<tr><td><u>Exception Conditions:</u></td><td>1.1 There are no constituents to add or edit</td></tr>
</table>

Storyboard for Setup Salesforce



Report Layout

Constituent

Constituent Name	Title	Date Donated	Donation Amount	Phone #	Volunteer hours
Joseph	Donor	3/12/2020	$5,000	6785451234	NA
Adam	Volunteer	NA	NA	7707896547	35
Jaymie	Volunteer	NA	NA	678852659	125
King	Donor	2/1/2020	$2,000	6789413684	NA

Household

Household Name	Address	Member 1	Member 2
Anderson	100 Oconee Street, Athens GA 30605	Joseph	Jasmine
Cooper	200 Lakeside Dr, Athens GA 30605	King	Jaymie
Brown	1000 Oconee Street, Athens GA 30605	John	Jane

Organization

Number of Donors	Number of Volunteers	Number of Constituents	Total Donation Amount	Year	Month	Number of Clients
25	150	300	$10,000	2019	July	16
15	73	150	$4,000	2020	March	7

Prioritize User Stories

1. Set up Salesforce Website
2. Create DataBase Schema
3. Manage Constituents
4. Manage HouseHold Account
5. Learn how to generate reports with filters in Salesforce
6. Manage Organization
7. Manage Affiliation
8. Generate Constituent Report
9. Generate HouseHold Report
10. Manage Address
11. Generate Organization Report
12. Learn how to create community pages
13. Manage Constituent through Community
14. Learn how to print mailing labels
15. Generate Household Mailing Label

16. Implement data recovery system
17. Implement data security system
18. Create Visual representation of client data
19. Customize Website Design

Estimate Effort

Velocity = 21 points/sprint

Team Capacity

Development Team Member	Hours per Week	Average Hours
Aqeel	1-3	1.5
Jay	1-3	2.0
Jesse	1-3	1.5
Kallie	1-3	1.5
Scott	1-3	2.0
Willie	1-3	1.5
	Total Average Capacity:	10

Planning Sprints:

Sprint 1 Sprint 2 Sprint 3 Sprint 4 Sprint 5

Prioritized User Stories	Points	Tasks (Estimated Time)	Total Time
Set up Salesforce Website	7	1. Create login information (5 minutes) 2. Plan for when each team member can login to access it (25 minutes)	½ hour

Create DataBase Schema	5	1. Create each entity (20 minutes/entity) 2. Create relationships (20 minutes)	2 hours
Manage Constituents	7	1. Add all existing Constituents (2 hours) 2. Create instructions for managing constituents (1 hour)	3 hours
Manage Address	6	1. Add all existing Addresses (2 hours) 2. Create instructions for managing addresses (2 hours)	4 hours
Manage HouseHold Account	7	1. Add all existing Households (2 hours) 2. Create instructions for managing Households (1 hour)	3 hours
Learn how to generate reports with filters in Salesforce	8	1. Research (2 hours)	2 hours
Learn how to print mailing labels	2	1. Research (2 hours)	2 hours
Generate Household Mailing	4	1. Add Mock Data to use for	3 hours

Label	4	testing (2 hours) 2. Create instructions on how to Generate Household Mailing Label (1 hour)	
Manage Organization	6	1. Add all existing Organizations (1hour) 2. Creating instructions for managing organizations (1 hour)	2 hours
Manage Affiliation	6	1. Add all existing affiliations (2 hours) 2. Create instructions for managing affiliations (1 hour)	3 hours
Generate Constituent Report	5	1. Setup report layout/connect report to entities (2 hours) 2. Add in report filters (1 hour) 3. Create instructions for creating a Constituent report (1 hour)	4 hours
Learn how to create community pages	3	1. Research (1 hour)	1 hour
Generate HouseHold Report	8	1. Setup report layout/connect	4 hours

		report to entities (2 hours) 2. Add in report filters (1 hour) 3. Create instructions for creating a Constituent report (1 hour)	
Manage Constituent through Community	7	1. Create Community Page for Constituents (2 hours) 2. Create instructions for managing Constituents using community page (2 hours)	4 hours
Generate Organization Report	8	1. Setup report layout/connect report to entities (2 hours) 2. Add in report filters (1 hour) 3. Create instructions for creating a Constituent report (1 hour)	2 hours
Create Visual representation of client data	6	1. Choose data to visualize (1 hour) 2. Create Visualizations to present to client (3 hours)	4 hours
Customize Website Design	7	1. Create Custom Navigation (30	4 ½ hours

		minutes) 2. Create custom UI with custom code (4 hours)	
Total points	106	Total hours	48

Deliverable 5 (Sprint 1)

User Story Table

User Story	Brief Description	Acceptance Criteria	Met/Not Met
Set up Salesforce Website	The Development Team sets up the Salesforce website the project will be based on.	Create login information.	Met
Create Database Schema	The Dev Team creates a schema for the database to organize where all of the data will be stored on the website.	Create a database schema for the assigned Domain Class Diagram in third normal form (3NF). All	Met

		many-to-many relationships must be normalized.	
Manage Constituents	Staff creates, updates, or deletes Constituents.	Must be able to create a new constituent. Must be able to update a constituent. Must be able to delete a constituent (if needed). The constituent table should be populated with attributes to be finalized by the product owner. Must be able to search for constituents before adding a new constituent.	Met
Manage Address	Staff creates, updates, or deletes addresses.	Create a new address for each constituent. A constituent can have many addresses (home	Met

		address, mailing address, work address, school address, billing address, etc). Must be able to update an address for a constituent. If the address is the home address, must be able to update for all affiliated household members. Must include a way for constituents to opt out from automatically updating their home address.	

Starting Sprint Backlog

Prioritized User Stories	Team Member Responsible	Tasks (Estimated Time)	Total Time
Set up Salesforce Website	Jesse	3. Create login information (5 minutes) 4. Plan for when each team member can login to access it (25 minutes)	½ hour
Create DataBase Schema	Aqueel & Jay	3. Create each entity (20 minutes/entity) 4. Create relationships (20 minutes)	2 hours
Manage Constituents	Jesse	3. Add all existing Constituents (2 hours) 4. Create instructions for managing constituents (1 hour)	3 hours
Manage Address	Jesse	3. Add all existing Addresses (2 hours) 4. Create instructions for managing addresses (2 hours)	4 hours

Sprint Review

https://drive.google.com/file/d/1fap2LSUed6WJ3xX-Mw4ed1Bd3trI0lUa/view

Sprint Retrospective

Positive Observations

- Work was completed on time and without confusion between responsibilities
- Communication was active and key to completing our duties
- Work morale on team was high throughout working on the project
- Completion of duties came without issues/problems

Improvements to Focus On

Issue	Underlying Reason	What to Change

Issues understanding what was required for our first Sprint	Long time away from the project, rusty on certain criteria	Stay up to date with the next 2 sprints
Issues with screencasting software	Simple technology issue	Be prepped with backup software if one does not work.