

Salsa Engage - Product Description

MARCH 2025

Product Summary	
<p>Salsa Engage is a browser-accessible, digital engagement software as a service (SaaS) platform designed for non-profits of all sizes, but particularly mid-market organizations. Salsa Engage includes tools that help empower non-profit organizations to better communicate, advocate, and fundraise for their mission. In addition to the default tools included, Salsa Engage has a plethora of third-party integrations users can configure to expand upon their usage of the platform, either using our API (Application Programming Interface) or direct integration that is set up in-app.</p>	
Term	Definition
HQ	HQ refers to the login page for Salsa Engage (https://hq.salsalabs.org/#/login)
Activities Tab	Activities in Engage are where users can find their form building tools, including fundraising, advocacy, and event page templates and builders.
Emails and Autoresponders Tab	The Emails Tab in Engage is where users can go to create email blasts. Autoresponders are preconfigured emails users can edit that get sent automatically when an action is taken (I.E., a donor has submitted a form)
Text Messaging Tab	Text Messaging is the section in Engage where users can go to craft text messaging blasts, both broadcast (sending messages out) and text to initiate (supporters can text a keyword to get an actionable message back).
Insights Tab	Insights is the page where users can find reporting and analytical data. This reporting is not CRM-level donor data, but rather reporting on the effectiveness of forms in use and emails sent.
Transactions Tab	This is where users can go to see the transactions coming through Engage forms or imported into Engage. They can also give refunds from this page.
Assets Tab	The Assets Tab is what Engage calls images and templates. The assets tab is where users can go to manage their image library and templates. They can upload images and edit, copy, or rename existing templates for emails and forms, both premade and custom.
Supporters Tab	Supporters is the section in Engage where users can go to look at their overall supporters list, individual supporter profiles, create/manage groups, and do supporter record imports.

Salesforce Tab	For customers who bought our integration with Salesforce, this is the tab where they can set up their connection with their Salesforce instance and run/manage syncs between the two platforms.
Groups	<p>Groups in Engage are a collection of supporters that users can bundle together to target or isolate from an email blast and other communications, along with query and reporting on a specific group.</p> <p>Groups have both a static and dynamic option, static groups have members manually added/removed by individuals while dynamic groups allow users to set up a query which updates the group members daily based on meeting/no longer meeting the set criteria in the query.</p>
Targeted Actions	Targeted Actions are what Engage calls advocacy forms. They are designed to allow supporters to fill in their personal and address information and then allow them assorted options, such as email, phone calls, and tweets (x posts?), to connect with their representative without having to leave the page they are on.
Visual Editor	This is the drag and drop editor used for both email building and form building, found under the activities tab for both forms and emails. This allows users to drag blocks of content into their email or form and make simple edits to the color/text without needing to worry about reformatting their entire email or page. They can use assets from their asset library or upload an image directly to the assets tab from the editor.
Syndication	Syndication is used for two primary reasons. First, a main Salsa run Engage account creates seasonal email and form templates that are pushed out to all Engage accounts, so orgs using Engage receive refreshed and new templates a few times a year. They can save those templates for future use, even if it is no longer listed as a premade template. Second, it can be enabled for organizations with chapters to share templates between the main org profile and their chapters without needing to recreate the template in the chapter orgs.
P2P	Peer-to-peer, a type of fundraising where orgs can allow their supporters to sign up and create their own fundraising page to raise money for the org.
Email Series	An Email Series is a feature located within the Email Tab that allows users to configure a series of emails (can also just be a single email) which triggers to send when a supporter meets certain criteria. These can be configured to send at different intervals (I.E., you can configure the first email to send once the support takes an action, then have the second email to send 3 days after the first)

Rolling Time Zone (RTZ)	Rolling Time Zone is an email feature which allows users to configure their email blasts to send at a specific time across time zones. Users can set a blast to go at 9AM and it will send to each supporter at 9AM their time, based on their address information.
Tracking Codes	Engage has a feature that gives users the option to set a tracking code on email links or for Activities they create, which allows them to query on those codes and see traffic/donations driven via the links or forms the code is present on.
Drag and Drop Editor	Part of the Visual Editor tool, the drag and drop editor option allows users to simply drag premade components into their email without needing to know how to use HTML to format those components. They can quickly drag in things like text blocks, images, section dividers, pre-formatted sections, and other basic building blocks of an HTML-based email. They can even drop in a box specifically for HTML so they can add their own while using the drag and drop editor.

Business Process 1: Constituent Communications

Describe the business process the product facilitates. Copy this table for additional processes.

Users can create, build, and coordinate email blast, text message, and social post campaigns to send to their supporters (constituents) utilizing a suite of list segmentation and automation tools.

Use Case(s) <i>How users will perform tasks to achieve their goal</i>	Capability <i>The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.</i>
“As a communication, marketing, and/or development professional, I want to quickly set up a professional and engaging email blast to send to our supporters so we can easily reach and engage our target audiences”	Visual Editor With Salsa Engage’s visual editor tool, users can easily build, edit, and preview their email blast using the drag and drop editor. If they prefer, they also have the option to build the email entirely in HTML. Users can control the color and text styles, either setting a default for the entire email to use or individualizing each part of the email. The visual editor tool used in email blasts is the same tool used for form building in Engage. Users can copy any templates they make or edit for future use as well.
“As a communications professional I want to be able to individually personalize email or text blasts I send to my full supporter list, so each recipient feels it was personalized for them”	Merge Tools For email and text blasting, Salsa Engage offers an easy-to-use merge functionality allowing the user to call in almost any piece of information they have listed on a supporter profile and set a default value if a particular supporter is lacking a value in that field.

<p>“As a communications professional, I would like to segment my lists and group my supporters based on their interests or preferences without needing to spend significant time formatting a separate document offline”</p>	<p>Supporter and List Management</p> <p>Supporters and lists can be managed under the Supporters Tab in Salsa Engage. Users can bulk import, manually add individual supporters, and delete supporter records directly from this tab. They can also create and/or add supporters to groups during the import itself.</p> <p>Import Tools</p> <p>Most similar SaaS products have import functionality, but what makes Salsa Engage stand out here is the smart id import headers. The import tool in Engage will auto-match the column headers to the appropriate field so users do not have to worry about configuring their import list to be in the proper format. If they use a comma separated value (CSV) doc, the import tool can read the headers and assign the data to the right field. Users can override or correct any that are mislabeled or unable to match using a simple field dropdown selector.</p>
<p>“As a communications professional, I would like to reach my constituents via social media channels in addition to traditional email or text communication”</p>	<p>Social Media Marketing Tools</p> <p>On their Social Tab, users can connect their organization social media accounts to Engage, and use Engage to configure and schedule normal posts, along with managing and running their Facebook targeted ads via Engage. Users also have access to a third-party option that allows them to utilize their forms on Facebook.</p>
<p>“As an organization with supporters located across time zones, I would like to have my emails sent during peak engagement time or all recipients”</p>	<p>Rolling Time Zones</p> <p>Engage users can set their emails to send all-at-once either right away or at a set time/date. If scheduling for a future time/date, users can set the email to send on a rolling basis, which will trigger the email at a set time across time zones. For example, they can set it to send at 10 in the morning, and it will trigger to supporters based on their time zone at 10 their time.</p>
<p>“As a communications professional, I would like to run campaigns encouraging users to text us to receive an actionable message or directly message them upcoming actionable items”</p>	<p>Text Messaging</p> <p>Engage supports text message blasts and text to initiate options within the Text Messaging Tab. Since there are no visual components to texting, Engage has a plain text editor and message preview to show how the message will look on a phone screen and simple send tools like sending right away or scheduling for a specific time/date. Text does not support rolling time zones currently. Text numbers in Engage are controlled by Salsa in Twilio, but customers pay Salsa for usage of the number.</p>
<p>“As a communications professional, I would like to see the results of my email blasts. I would like to know how/if my emails are being opening, if any actions have been</p>	<p>Insights and Reporting Tools</p> <p>Engage’s Insights Tab has plenty of offerings when it comes to analytics on email or text performance. You can view key statistics on</p>

taken from them, and if it is driving traffic and results to my desired outcomes”	Individual blasts, query on specific outcomes/criteria, and review trends across your outreach methods. Each individual blast sent will also show within the blast itself a results page where users can see all this information presented in charts and graphs. They can filter this information as well.
“As a communications professional, I would like to send out a newsletter and/or post it on my website”	View Email on Web Link Engage offers users a a “view email on web” option which when enabled provides a link to the email on a webpage hosted by Salsa. This allows users to copy that link and host it on their website or paste their email blasts to their social media platforms if they please.

Business Process 2: Fundraising, Events, and Advocacy Describe the business process the product facilitates. Copy this table for additional processes.	
Users can create, build, and coordinate forms to build their supporter lists, fundraising for their causes, and provide their supporters with advocacy options, allowing them to craft a unified image with a consistent design theme across their actions without needing experience in web design or mark-up languages since our visual editor and form building tool is the same across activity type.	
Use Case(s) How users will perform tasks to achieve their goal	Capability The single operation that adds value and contributes to the user achieving the use case goal. Add rows to the table as needed to accommodate the list of capabilities for the given user story.
“As a fundraiser, I want to be able to quickly create and published an online fundraising form to start raising funds for my org”	Online Forms and Visual Editor Using the same drag and drop visual editor tool that is present in the email section of Engage, users can build forms from a pre-made template or scratch. They can send supporters to an Engage-hosted page to access the form or embed it directly on their webpage using an embed code provided by Engage upon publication of the form.
“As a fundraiser, I would like to be able to accept different forms of payment when receiving donations online”	Payment Options Engage supports standard credit cards, integration with PayPal, and ACH payments though our payment processing partners.
“As a fundraiser, I would like to use machine learning and insights to guide my fundraising outreaches”	Machine Learning and Smart Asks When creating a form in Engage, users can set their suggested donation amounts. They can make these static amounts that do not change, or they can utilize our Machine Learning “Smart Ask” tool which lets the configure dynamic amounts based on supporter data. For example, they can configure it, so each individual supporter sees suggested amounts within their average giving range, or a default if they are a new donor.

<p><i>“As a fundraiser, I would like to have donations collected online sync to my CRM tool without need to export and import data consistently”</i></p>	<p>Integrations with Salsa CRM and Salesforce</p> <p>Using a direct integration with our own Salsa CRM or direct integration with the orgs Salesforce CRM, users do not have to do anything after initial configuration of their syncs to ensure data collected during fundraising and email list sign-up collections are pushed to their CRM platform.</p>
<p><i>“As an advocacy organization, I want to be able to create actionable items for my supporters to take part in and drive change”</i></p>	<p>Advocacy Tools</p> <p>Advocacy options are found under the activities tab in Engage. Within that tab, and using the same visual editor as outlined above, users can create actions to connect their constituents with their representatives or create and manage petitions.</p> <p>Using the address entered the form, the action will update to let the supporter know if they are region is part of this targeted action and if so, provide them different options to reach out to the representative (Email, Phone, Tweet)</p> <p>Users can also import a list of custom targets to target with their actions.</p>
<p><i>“As an organization with an Event coming up, we would like to be able to take and track online registrations and donations towards the event”</i></p>	<p>Ticketed Event Forms and Controls</p> <p>Engage allows users to create an event form where they can track registrations or ticket purchases. Tickets can be free, have a cost associated with them, and even be set to limited quantities depending on the user preference. Users also have the option of providing registrants with a discount code to enter during checkout to lessen any cost. Supporters who cannot make the event have an option to donate in lieu of purchasing a ticket.</p>
<p><i>“As a fundraiser, I'd like to be able to see how effective my online actions and fundraising forms are and how they are performing compared to past actions”</i></p>	<p>Insights</p> <p>The same insight and query tool that is available for email campaigns is useable for fundraising or advocacy campaigns. Again, allowing users how know one portion of the product to easily apply that knowledge in other areas.</p>
<p><i>“As a communications or fundraising professional, I would like to see which of my outreach efforts is driving the most supporters to act and where my pages are receiving them most traffic from. This will allow me to understand which content I am creating is driving engagement so I can more efficiently and effectively craft future campaigns.”</i></p>	<p>Tracking Codes and Individual Message/Form Analytics</p> <p>Salsa Engage supports user-created tracking codes in-app. These are not tracking pixels, but rather a code you can add an extension to the URL for a particular link in an email. Any clicks on that link via the email are then shown along with the conversation rate (who clicked, then completed the action) on an analytics page for each form and email the code is set on. This allows communications and fundraising professionals the ability to see what kind of emails are driving the most traffic to their campaigns online and who is clicking on these links.</p>
<p><i>“As a fundraiser, I would like to empower my supporters to raise</i></p>	<p>Peer-to-peer (p2p) fundraising</p>

<i>money on behalf of the organization”</i>	A recurring theme, but in Engage users can set up a P2P fundraising page using our visual editor tool, which allows their supporters to sign up and manage their own fundraising page, allowing the supporter to customize the description and pictures, so the supporter can raise money via their friends and family for the organization. There is even a tracker where they can set funding goals and track the progress towards those goals.
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