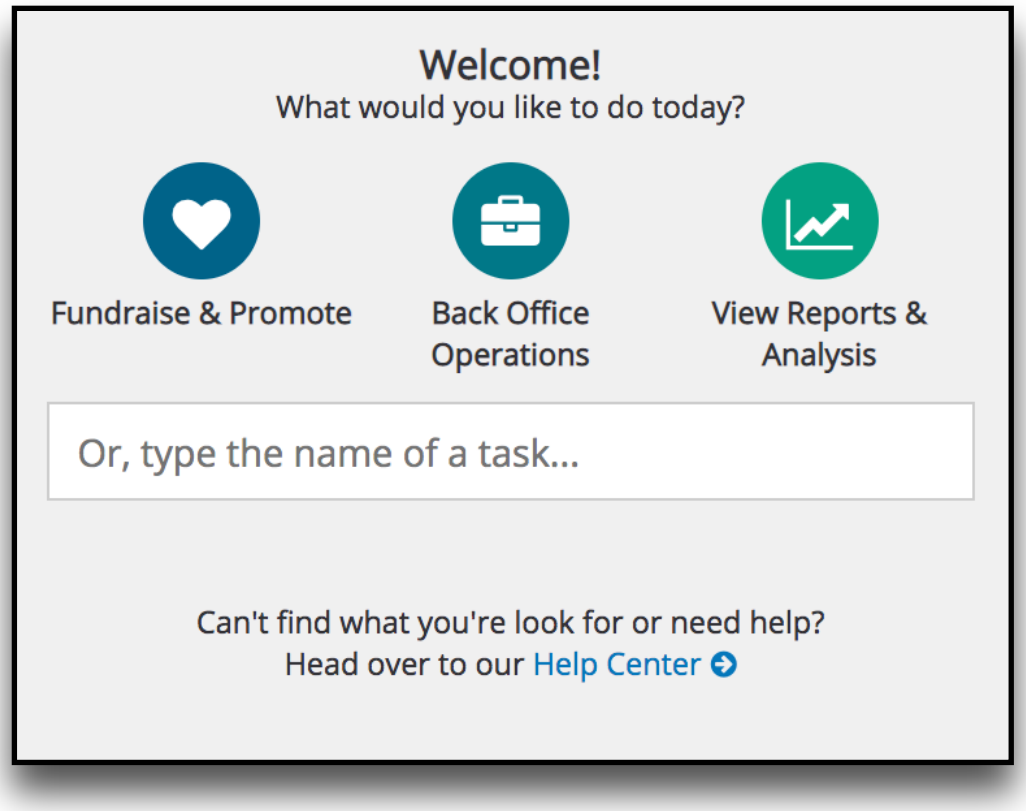
More stuff. Less clicks.

Welcome to the CharityEngine Summer 2019 Product Release



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CharityEngine®

Here's what's new in CharityEngine!

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More stuff. Less clicks.

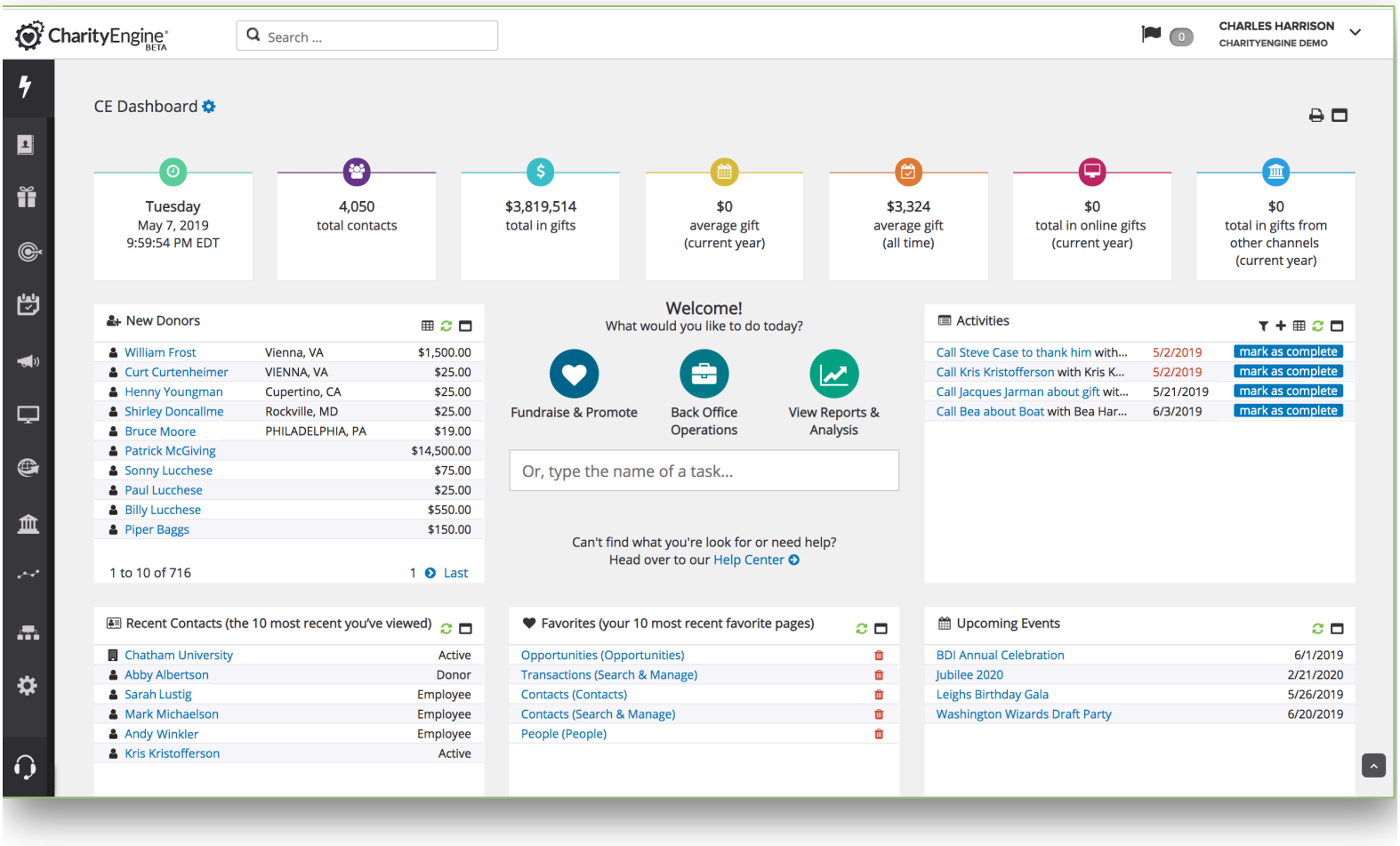
That's what we're strived for with the summer 2019 release of the CharityEngine nonprofit CRM and all-in-one fundraising platform.

More strategic stuff like reporting and workflow automation tools for highly configurable communication series for donors, advocacy supporters, sustainers, event goers and others.

More self-service stuff for donor and event management tools like the self-configurable user center with event guest management and communications personalization.

More design stuff for customizing the user experience like advocacy iframes and the redesigned Content Management system's tokens and conditional capabilities.

And all of it designed to get your most complex tasks for fundraising and donor management completed **in as few clicks as humanly possible.**



Feature 1: Part dashboard/Part launchpad: The new welcome screen

The first thing you will likely notice after logging in is the new updated welcome screen which was designed with the typical user in mind.

Easily navigate to what you would like to do next, whether clicking or typing into our new intuitive search bar.

It also puts management data at your fingertips - giving you a snapshot of how close your organization is to meeting its goals, what tasks you have coming up (or are overdue), and who your new donors and prospects are.

***Note: We need your goals for the year**! Please let support or your account representative know what your FY19 goal is and we can populate that goal for you.*

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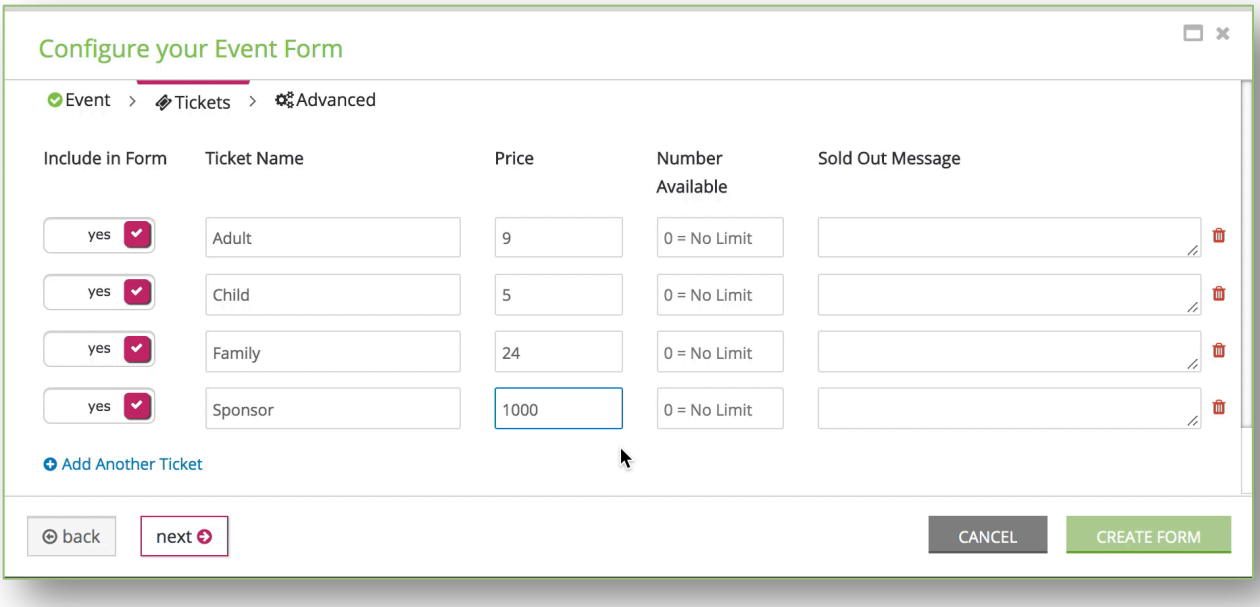

Feature 2: Spin-up registration pages faster: The new event form wizard

Fundraising and cultivation events are vital to the success of an organization. With that in mind, we wanted to make event creation and guest management as easy as possible.

The new event form wizard will allow users to create an event, the event's tickets, and a new event form in one wizard. The form wizard is also available for existing events.

We have also introduced the ability to copy events and their associated tickets, saving you even more time when creating events and forms!

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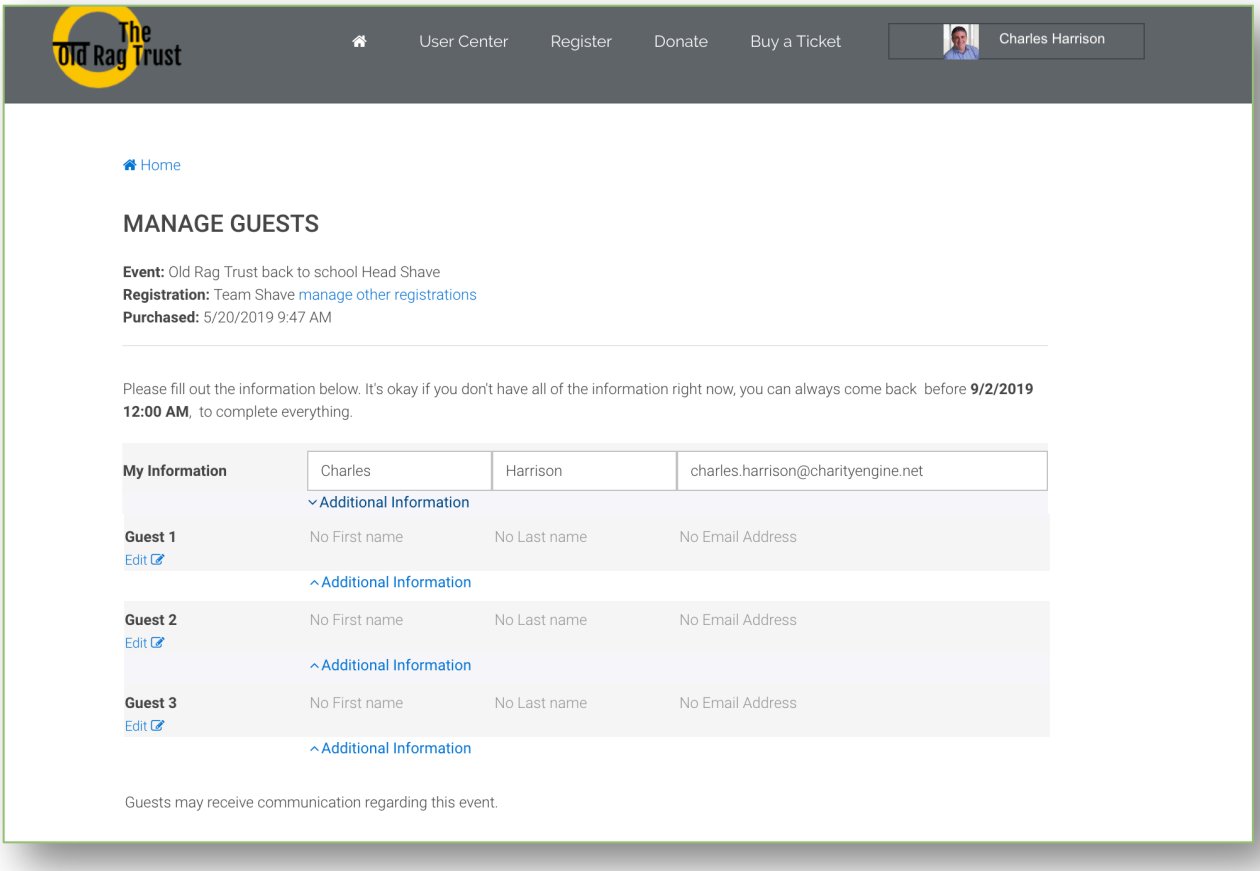

Feature 3: End emailing guest lists! User-center event host management

Managing an event's guest list is a time consuming and sometimes stressful task for any event coordinator. In this release, we have introduced a new guest management feature—registrants can now share the name, contact information, and dietary restrictions of themselves and their guests.

The best part? Hosts and guests can edit and update their tickets online until a time designated by event staff. If your event is Saturday morning, discontinue guest management on the prior Thursday at noon.

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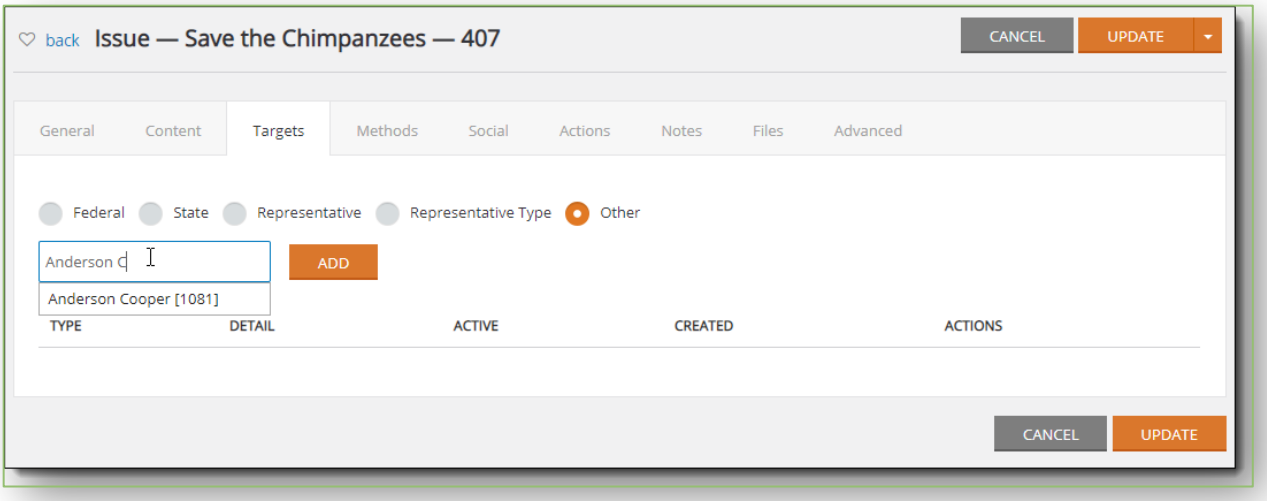


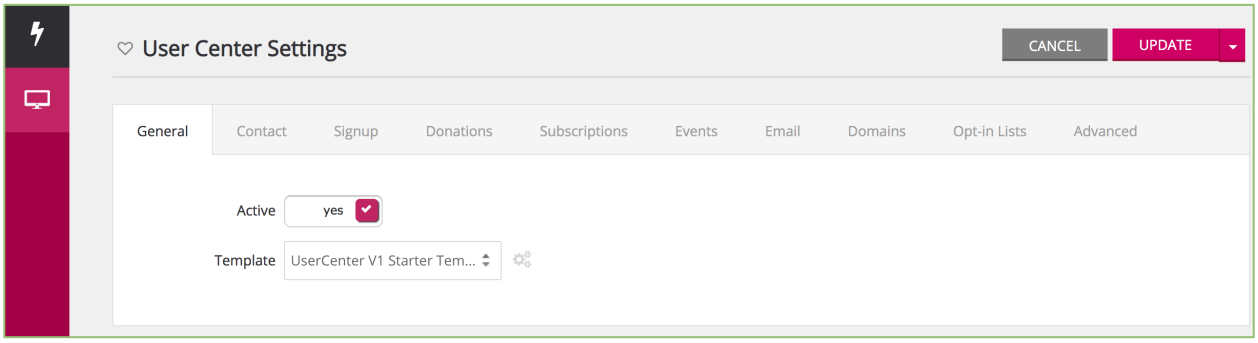
Feature 4: Pick your battles. Advocacy target customization

Advocacy issues in CharityEngine can now be configured to target a specific representative type, a specific representative (or group of representatives), and custom contacts.

Let's say your advocacy issue has already passed in the House and now needs to go on to the Senate. With the new customization features, the issue can be configured to only include Senators. Or News personalities.

Feature 5: Your pages or ours? Advocacy iframe widget

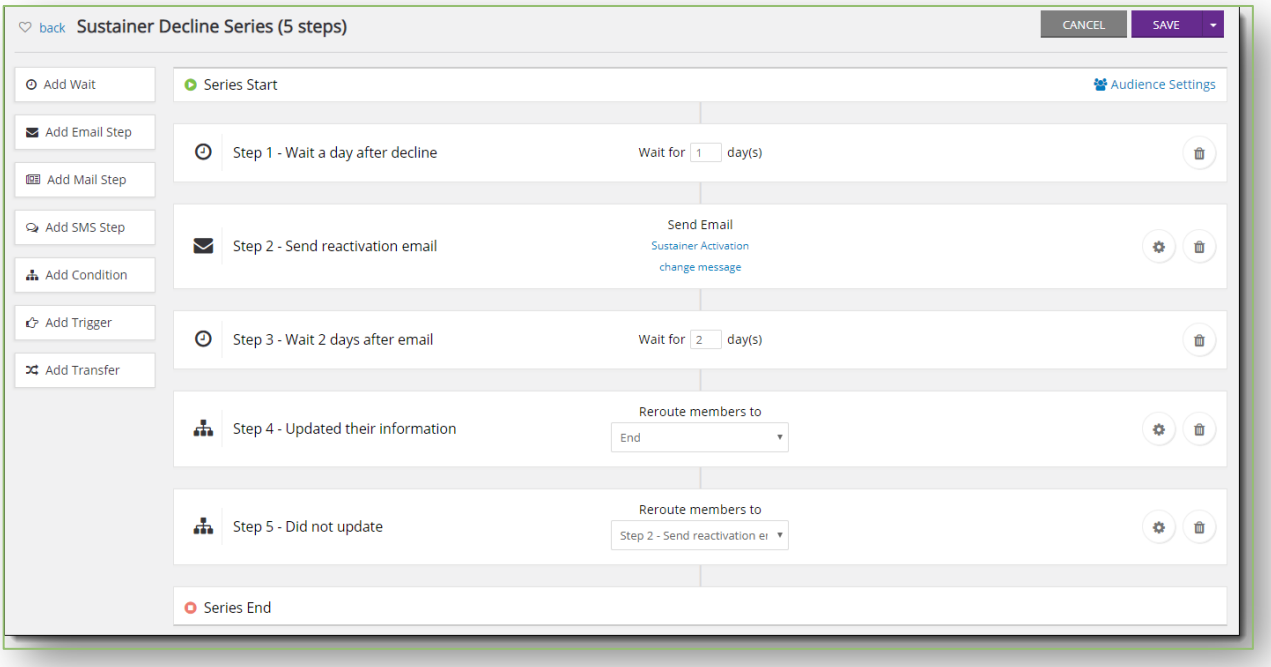
Advocacy issues can now be located on your organization's third party website. Simply log into your advocacy issue, and copy the iframe code!



Feature 6: Self-service is full service. User center enhancements

Everyone gets a User Center now! In this latest release, CharityEngine is providing a default template for User Center. Every customer can now offer this self-service tool to their donors and members.

Within the User Center, donors can update their communication preferences, their payment method for their monthly donation, and print out an acknowledgment for a past donation.



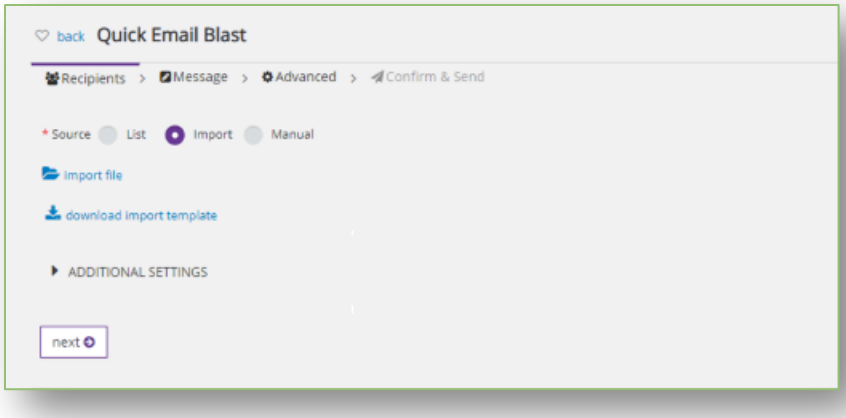
Feature 7: Create marketing plans down to each prospect.

Communication series and workflow engine*

Whether you're cultivating a new supporter after a donation success or contacting a sustainer after a payment failure, it's easier than ever to automate and personalize communications.

With the new Communication Series, CharityEngine users can create workflows that will send emails, assign attributes, create opportunities, and even generate a mailing list in an easy to understand user interface.

**Note: As of the release date, Communication Series is still in the beta stage. Please join our upcoming webinar that will be devoted exclusively to using this extraordinary new capability.*

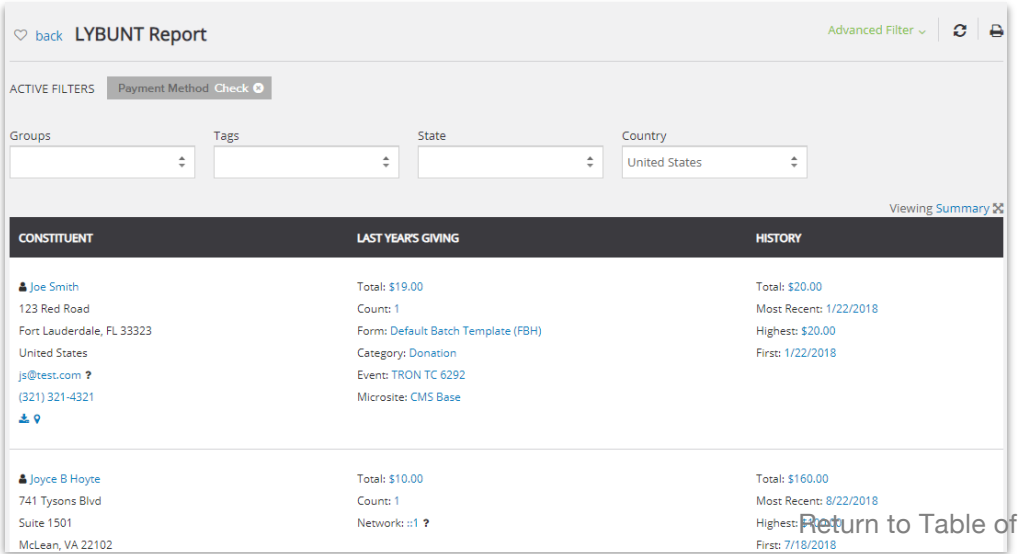


Feature 8: Send emails fast! Easy list import for email sends

Users can now import their email list while they are preparing to send their message! This time-saving new feature will look for existing contacts to email and add new contacts if no existing ones are found.

Feature 9: Manage your entire website: CMS application redesign

Creating CMS websites and the associated webpages is now easier than ever. In addition to the UI improvements, we added a new taxonomy infrastructure that allows like pages to be associated with each other. Curious as to how this works? Check out our new Help Center, which utilizes this new feature set in the related pages sidebar. Most important for designers working on a new website – there is no lag time in between making your edits and seeing those changes live on your website.



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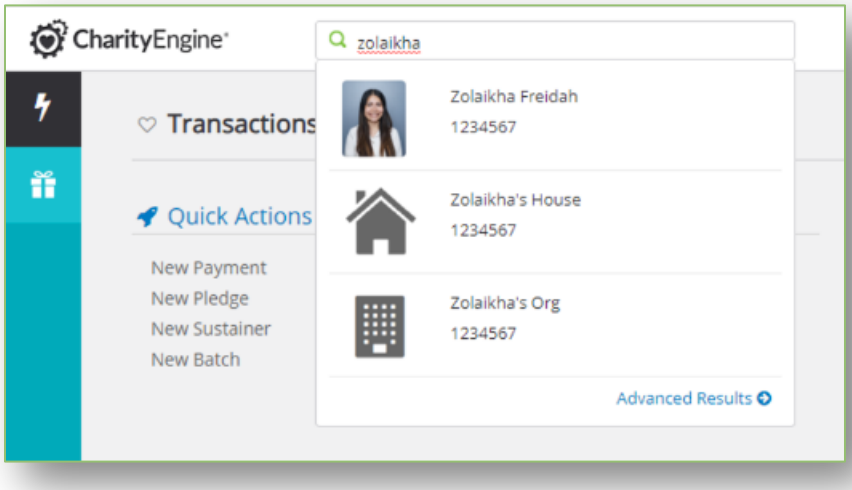
Feature 10: Fortunately, more ‘unfortunately’s. More standard reports

More out-of-the-box reports including these two favorites – LYBUNT (Last Year But Unfortunately Not This) and SYBUNT (Some Year But Unfortunately Not This). These reports will help identify who has not donated yet this year, but has donated historically. Some of the filters available in this report – solicitor, campaign, countries, and groups/tags.



Feature 11: Far & wide meets pinpoint. Global search preview

Global Search will now preview contacts that match on screen and take end users directly to their contact record. The full results of all matching records will still be available when you expand results.

Feature 12: Platform wide content enhancements

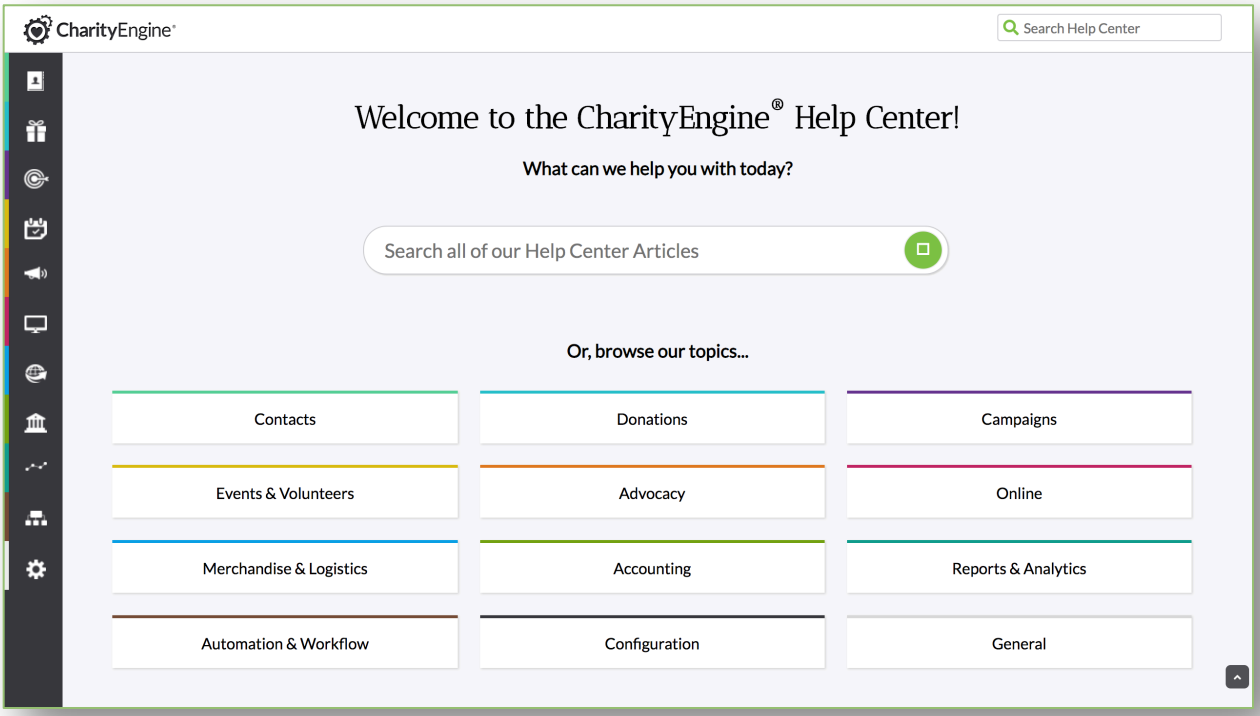
There are three new features available throughout the application that will support dynamic content creation:

The **Conditional Content Helper** will assist customers in writing their own Conditional Statements using CharityEngine tokens. Maybe you want to show a different thank you message on the receipt page of Webforms if

someone donates more than $500.This is easily accomplished through the Tokens and Conditional Content Helper.

Global Organization Tokens were added to support the Starter Kit templates and form wizards. When you use the new event form builder, the form will include your logo and your organization's info in the receipt. To utilize this new feature, you will want to visit the Account Settings tab page in Configuration and update it with your organization's information.

Content Widgets are available to format dates and currency in your preferred format and to do things like list active advocacy issues or related CMS pages. We will continue to add Widgets, so please let us know if there is something else you would to like to see!



Feature 13: Answers on-demand. New online help center

We are introducing a new Online Help Center with this release. All of the new features will be documented on Day 1, making it even easier to take advantage of our new offerings. The Online Help Center will be getting updated regularly, so check it out often to see what we have to offer.