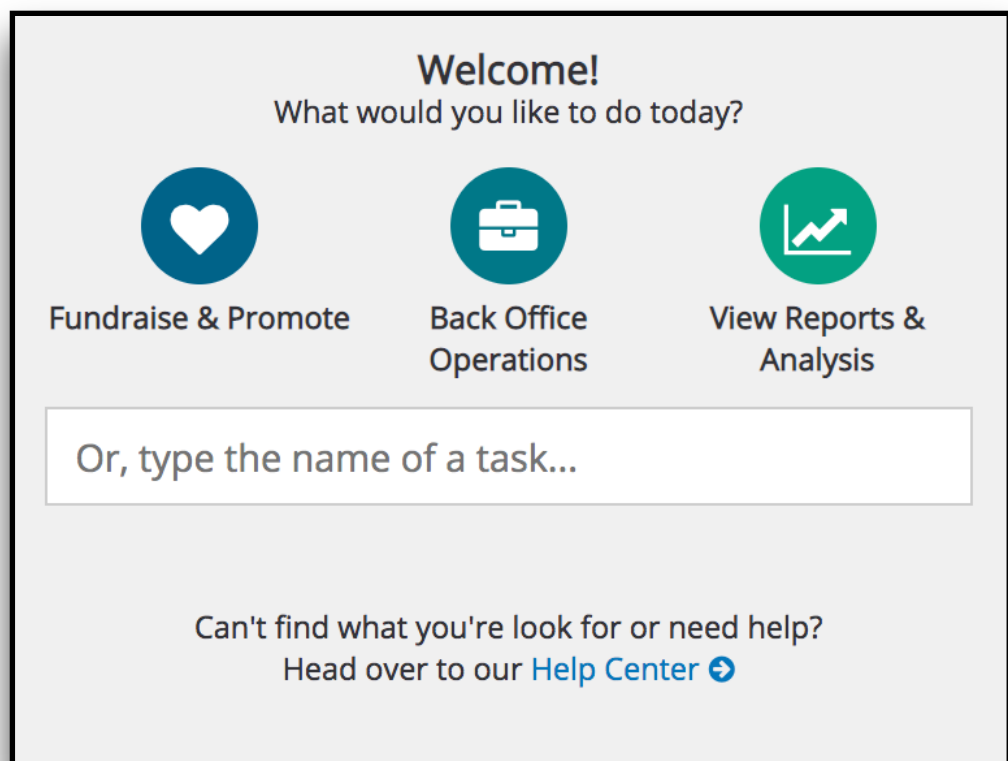


More stuff. Less clicks.

Welcome to the CharityEngine Summer 2019 Product Release



Here's what's new in CharityEngine!

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More stuff. Less clicks.

That's what we've 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.**

The screenshot displays the CharityEngine dashboard interface. At the top, there's a header with the CharityEngine logo, a search bar, and user information for Charles Harrison. The main dashboard area is divided into several sections:

- CE Dashboard:** A row of seven summary cards showing key metrics:
 - Tuesday, May 7, 2019, 9:59:54 PM EDT
 - 4,050 total contacts
 - \$3,819,514 total in gifts
 - \$0 average gift (current year)
 - \$3,324 average gift (all time)
 - \$0 total in online gifts (current year)
 - \$0 total in gifts from other channels (current year)
- New Donors:** A table listing recent donors with their names, locations, and gift amounts.

Name	Location	Amount
William Frost	Vienna, VA	\$1,500.00
Curt Curtenheimer	VIENNA, VA	\$25.00
Henny Youngman	Cupertino, CA	\$25.00
Shirley Doncallme	Rockville, MD	\$25.00
Bruce Moore	PHILADELPHIA, PA	\$19.00
Patrick McGiving		\$14,500.00
Sonny Lucchese		\$75.00
Paul Lucchese		\$25.00
Billy Lucchese		\$550.00
Piper Baggs		\$150.00
- Welcome!:** A central section with a "What would you like to do today?" prompt and three main action buttons: "Fundraise & Promote", "Back Office Operations", and "View Reports & Analysis". It also includes a search bar for tasks and a link to the Help Center.
- Activities:** A list of recent activities with dates and "mark as complete" buttons.

Activity	Date	Action
Call Steve Case to thank him with...	5/2/2019	mark as complete
Call Kris Kristofferson with Kris K...	5/2/2019	mark as complete
Call Jacques Jarman about gift wit...	5/21/2019	mark as complete
Call Bea about Boat with Bea Har...	6/3/2019	mark as complete
- Recent Contacts:** A table showing the 10 most recent contacts viewed, including names and status (Active, Donor, Employee).
- Favorites:** A list of favorite pages such as "Opportunities", "Transactions", "Contacts", and "People".
- Upcoming Events:** A table listing upcoming events with dates.

Event	Date
BDI Annual Celebration	6/1/2019
Jubilee 2020	2/21/2020
Leighs Birthday Gala	5/26/2019
Washington Wizards Draft Party	6/20/2019

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.

Configure your Event Form

Event > Tickets > Advanced

Include in Form	Ticket Name	Price	Number Available	Sold Out Message
yes <input checked="" type="checkbox"/>	Adult	9	0 = No Limit	
yes <input checked="" type="checkbox"/>	Child	5	0 = No Limit	
yes <input checked="" type="checkbox"/>	Family	24	0 = No Limit	
yes <input checked="" type="checkbox"/>	Sponsor	1000	0 = No Limit	

[Add Another Ticket](#)


[back](#) [next](#) [CANCEL](#) [CREATE FORM](#)


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!


[Home](#)
[User Center](#)
[Register](#)
[Donate](#)
[Buy a Ticket](#)


Charles Harrison

[Home](#)

MANAGE GUESTS

Event: Old Rag Trust back to school Head Shave
Registration: Team Shave [manage other registrations](#)
Purchased: 5/20/2019 9:47 AM

Please fill out the information below. It's okay if you don't have all of the information right now, you can always come back before **9/2/2019 12:00 AM**, to complete everything.

My Information	Charles	Harrison	charles.harrison@charityengine.net
	~ Additional Information		
Guest 1	No First name	No Last name	No Email Address
Edit	~ Additional Information		
Guest 2	No First name	No Last name	No Email Address
Edit	~ Additional Information		
Guest 3	No First name	No Last name	No Email Address
Edit	~ Additional Information		

Guests may receive communication regarding this event.

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.

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!

⚡

♥ User Center Settings

CANCEL UPDATE

General Contact Signup Donations Subscriptions Events Email Domains Opt-in Lists Advanced

Active yes

Template UserCenter V1 Starter Tem... ⚙

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.

The screenshot displays the 'Sustainer Decline Series (5 steps)' workflow in the CharityEngine interface. The sidebar on the left provides options to add various steps: Wait, Email, Mail, SMS, Condition, Trigger, and Transfer. The main workspace shows a vertical sequence of steps:

- Series Start**: The beginning of the workflow.
- Step 1 - Wait a day after decline**: A wait step for 1 day(s).
- Step 2 - Send reactivation email**: An email step with options for 'Send Email', 'Sustainer Activation', and 'change message'.
- Step 3 - Wait 2 days after email**: A wait step for 2 day(s).
- Step 4 - Updated their information**: A reroute step that leads to 'End'.
- Step 5 - Did not update**: A reroute step that leads back to 'Step 2 - Send reactivation ei'.
- Series End**: The final step of the workflow.

At the top right, there are 'CANCEL' and 'SAVE' buttons. The interface is clean and modern, with a light gray background and clear typography.

Feature 7: Create marketing plans down to each prospect. **Communication series and workflow engine***

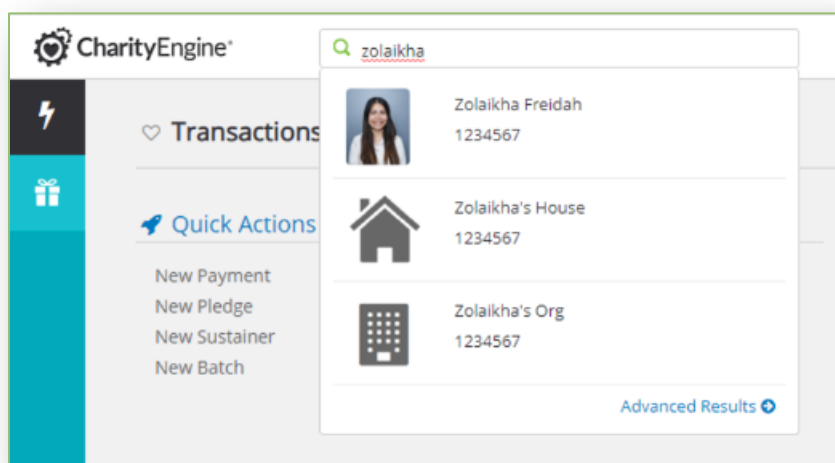
Whether you're cultivating a new supporter after a donation success or contacting a sustainer after a payment failure, it's easier than ever to automate and personalize communications.

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 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

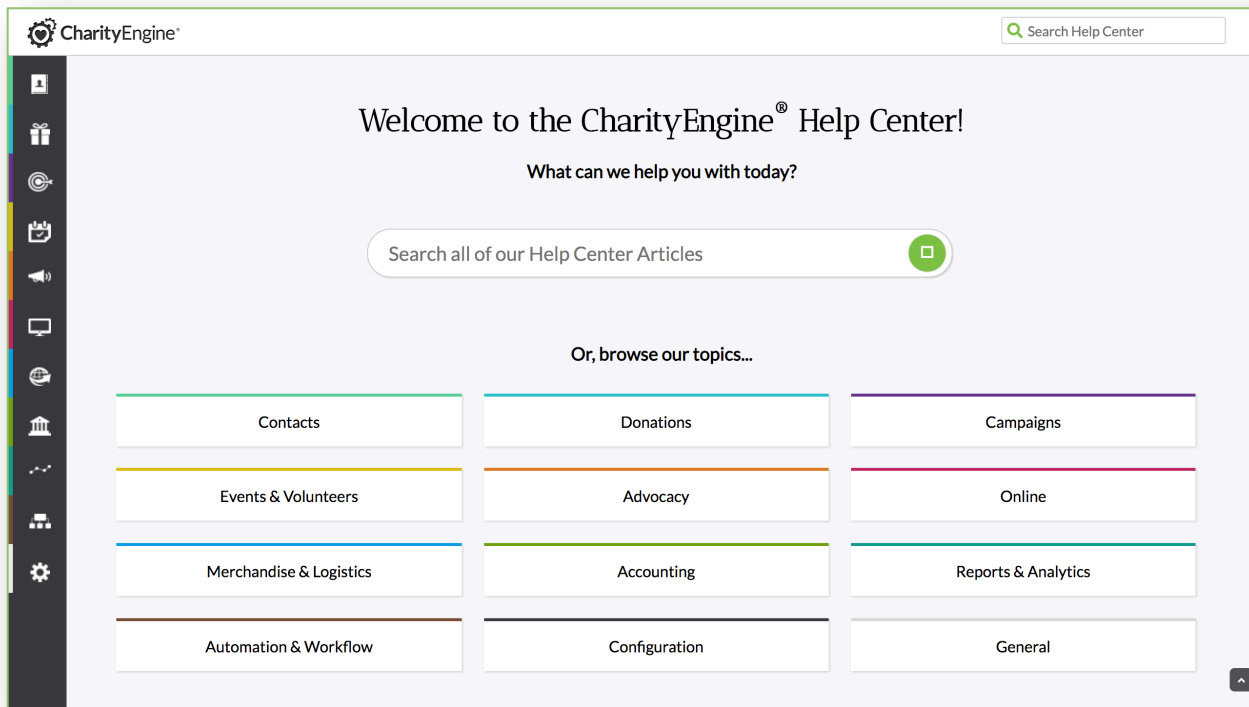
There are three new features available throughout the application that will support dynamic content creation:

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 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.