

# 2023 Q3

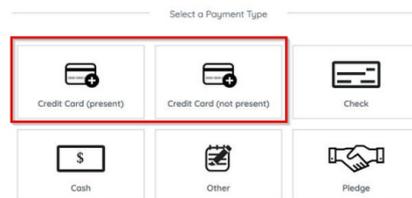
Last Modified on 09/21/2023 11:01 am PDT

July 1 - September 30

## GiveSmart Events

### Improvements

- **Pin Reset Improvements:** Pin codes will now be a combination of 6 letters or numbers. Letters and numbers of similar appearance have been excluded (EX: 1 & l).
- **Single Sign-On Admin Updates:** For single sign-on admin profiles, edits to the name, email or phone number will need to occur in GiveSmart Fundraise. Written guidance and links have been provided in all spaces where contact information can be modified.
- **GiveSmart Events Keyword Updates:** keyword edits made in Events will now display in the campaign dashboard in Fundraise.
- **Credit Card Name Verification:** when an admin is adding a new card on file via manual or credit card swiper, a verification popup will appear when the donor name does not match the card being added.
- **Manual Card Entry:**
  - **Donors:** donors who are logged in to GiveSmart Events will have their name & contact information pre-populate when filling out the payment information, allowing for faster and easier checkout procedures.
  - **Admin:** admin or volunteers who are manually adding a card on file on behalf of a guest, will have the guest name and contact information pre-populate in the manual card entry fields, allowing for a quicker and easier checkin/checkout process.
  - **New options for manual card entry:** Present and not present options are available for manual card entry during checkin and checkout. If 'present' is selected, only a zip code will be required to satisfy the address requirements for card entry.



- **Swiper Error Messaging:** additional error messaging has been added to provide further information as to why a card swipe may have failed.
- **Event App:** the **GiveSmart Events app** which can be found in the App Store, will now provide alerts when a newer version is available for download.
- **Updated Long Code #:** New toll-free number for long codes (US and Canada) is live and replaces the existing set of long codes. Anyone texting the old long codes will receive a message informing them of the new toll-free number.

No messages will be sent from this number. Current GiveSmart number is 1-888-301-6482. Txt HELP for help, STOP to unsubscribe. Msg&Data rates may apply.

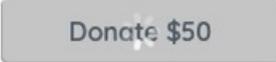
- **Multi-Product Customer Enhancement:** An Org Admin for a SSO Account can create a new auction from the Events side when there is no Fundraise Campaign setup.
- **Assignment Reminder Email:** Enhanced message to make it clear to ticket purchasers that they need to create an account to assign attendees.

{NAME},

We appreciate your support in purchasing tickets for {EVENT NAME}. You have at least one ticket unassigned. Please take a minute to sign in and provide details of the person you plan to share the ticket with. You'll need to create an account if you do not have one already.

{SPECIFIC NUMBER} ticket(s) have yet to be assigned to a guest.

- **Retain Credit Card On File:** When a purchase is made through an Order Form by a Donor or Admin, the Save My Card Information checkbox is now checked by default to help expedite future transactions during Check-in/Check-out.
- **Order Form Restructure:**
  - In the Home Page Donate Now Form, the Email and Custom Fields are now located in a new Donor & Payment Information Section that sits above the payment method selector.
  - In all immediate payment forms such as Order Forms, Immediate Check-out, and Donate Now Forms where payment is not made against an existing cart, there is a new streamlined layout that groups all Payment Options to improve the visibility of all payment options, plus the Cardholder Name is no longer needed for Google Pay or Apple Pay.
  - Payment Option details are collapsed until you select a specific payment option. In this example, when the Credit Card payment option is selected, the credit card payment details are expanded.
- **Progress Indicator:** In all immediate payment forms such as Order Forms, Immediate Check-out, and Donate Now Forms where payment is not made against an existing cart, there is a new "Progress Indicator" on Payment Button indicating that payment is in progress.



- **Google Analytics 4:** admin can now utilize their Google Analytics 4 **tracking code** to continue receiving analytics data from their GiveSmart Events sites.

## Bug Fix

- Adjusted failure message for digital wallet transaction failures (Apply Pay & Google Pay) to optimize experience and avoid confusion.
- The Terms and Conditions and Text Messages checkboxes no longer appear on Order Form Purchases for logged in users when Pay Later is enabled as they would have already completed that step during account creation or first login.
- Resolves issue that prompted Admins to complete Captcha verification when purchasing an item through Immediate Checkout.
- Resolved the issue that included transactions marked as pledges within the Donor CRM Lite Integration export.
- Resolved the issue that caused the admin to answer all required attendee ticket questions in a ticket order to complete the purchase.
- Swiper improvements to ensure error messaging and functionality align with expected behavior.
- Increase the refresh speed of the countdown timer when using the auto-extend feature

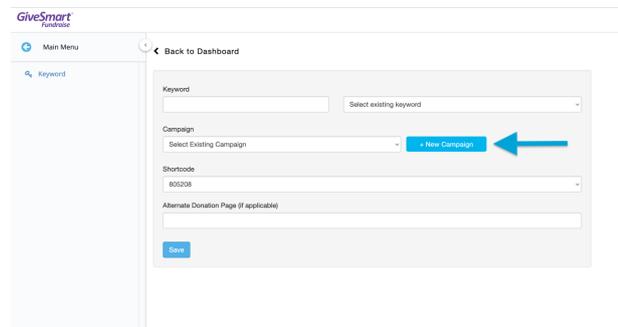
# GiveSmart Fundraise

## New Feature

- **Fair Market Value (FMV):** the fair market value is now an available option to add to **tickets** and **items**. By including a FMV, this information can be exported through the **Transaction Reports** and will be reflected on receipts and can be transferred to **Donor CRM** through the automated data sync.

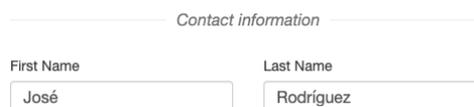
## Improvements

- **Create New Campaign:** you now have the ability to create a new campaign when creating a new activity. This is supported when creating the new activity in both GiveSmart Fundraise and GiveSmart Events.



The screenshot shows the GiveSmart Fundraise interface. At the top, there is a 'Main Menu' and a 'Back to Dashboard' link. Below this is a search bar labeled 'Keyword'. The main content area contains a form with the following fields: 'Keyword' (text input), 'Select existing keyword' (dropdown menu), 'Campaign' (dropdown menu with a '+ New Campaign' button highlighted by a blue arrow), 'Shortcode' (dropdown menu with '805208' selected), and 'Alternate Donation Page (if applicable)' (text input). A 'Save' button is located at the bottom of the form.

- **Processing Fee Default:** the **processing fee** field will now default to Optional for Purchasers.
- **GiveSmart Event links Supported:** Events links are now supported on Fundraise landing pages, and will open in a new tab.
- **Large List Exports:** For Lists with more than 100,000 constituents, downloaded exports will split into 2 files in the Download Center.
- **Name Accents:** accents on names are now accepted on all forms.



The screenshot shows a 'Contact information' form. It has two input fields: 'First Name' with the value 'José' and 'Last Name' with the value 'Rodríguez'.

- **Last Name Required:** a last name is now required for all offline donations.
- **Payment Method on Receipts:** the payment method will now be displayed on donor email receipts.
- **Creating/Editing Events Activities Restricted:** Creating or editing an Events Activity will present an error message for users or accounts without Global Admin access.
- **Events Page Rebranded:** the Events page has been rebranded to Activity Landing Page.
- **Matching Donations Selection:** matching donations have been updated to allow only 1 provider connection at a time.

## Bug Fix

- Fixed the issue that caused the Transaction API to return blank strings which was impacting various integrations.
- Resolved an issue that was allowing email on Crowdfunding signup forms to be hidden.
- Receipt PDF will now reflect transaction date as opposed to current date.
- An admin who is demoted from being a Global User will not longer see the 9-dot.

- Lists now correctly reflect how a phone number was acquired when the user used the widget on an activity landing page.
- Time and date filters corrected for Donor CRM file exports.
- Phone number formatting made consistent for creating and editing users.
- Character limits updated for all forms:
  - First Name and Last Name: 30 each
  - Email: 100
  - Street Address: 255
  - City: 50
  - Zip: 5
  - Promo Code: 30
  - Guest First Name and Guest Last Name: 30 each
  - Guest Phone: 10
  - Guest Email: 100
  - Email on Confirmation Page widget: 100

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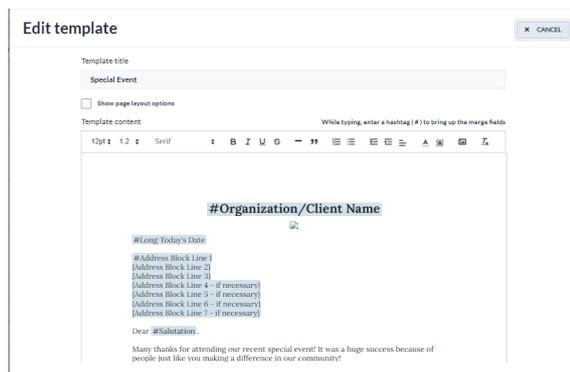
## GiveSmart Donor CRM

### New Feature

- **Bulk Actions:** quickly merge, add/remove tags or delete multiple records at a time by using the new **bulk actions** feature.
- **Resources Button:** admin can now easily find links to the Help Center and Support by clicking on the purple Resources button in the bottom left when in the Donor CRM module.

### Improvement

- **New Columns:** there are now 2 new columns on the Contact Listing and Gift Listing pages: Record Created & Last Updated.
- **New Folders & Filters:** now require a unique name.
  - **Existing duplicate folders and filters:** existing filters and folder that currently have a duplicated name will retain until the admin makes an adjustment, then goes to save the adjusted filter. The admin will be prompted with an error message to adjust the name upon saving.
- **Modify Thank You Field:** The Gift Thank You field on transactions that are sent through the Automated Data Sync are now editable within Donor CRM. Individual gift records can be edited and a Thank You can be sent from Donor CRM.
- **Adding Fields to Templates:** Added guidance information, *While typing enter a hashtag ( # ) to bring up the merge fields*, for adding fields to templates.



- **Branding Update:** removed all instances of GiveSmart learning center icons that referenced Simply Fundraising CRM.
- **Additional Guidance:** additional text supporting proper steps when adding data has been provide on the Launchpad.
- **Merging Center Updates:** updated the **merging center** UI to properly reflect the options that are available and needed.

## Bug Fix

- Fixed an issue where the Bulk Edit Merge Button was not showing properly after deleting a user.
- Donate Stock link has been redirected to an updated page.
- Fixed an issue where the proper errors were not showing upon import when information that is required was missing.
- Fixed an issue where Thank You letters sent via email were not displaying properly on iOS devices.
- Thank you letter template font will now match between the preview and the downloaded PDF.
- Searching by address in the main search bar will now search by Address 1, City or Postal Code.
- CVV field will now show on all donation links from mobile view.
- Fixed a bug where gifts over 10-digits were not properly showing on the contact profile.