

2023 Q4

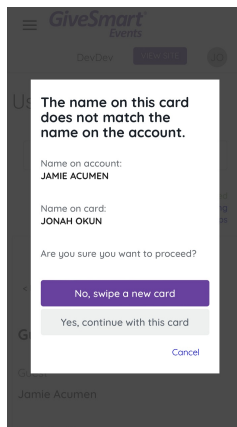
Last Modified on 01/12/2024 10:35 am PST

October 1 - December 31

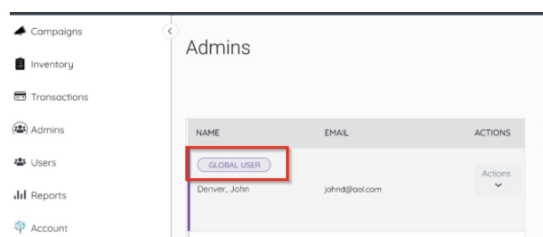
GiveSmart Events

Improvements

- **Phone Number Validation:** in all locations where a phone number is being entered, new parameters have been implemented to ensure the number being entered is valid.
- **Ticket Order: Admin Credit Card Options:** to facilitate manual admin card entry during a [ticket order](#), 2 new options appear: Credit Card Present & Credit Card Not Present.
- **Automated Data Sync Payment Type:** when split payments are made on the same order, this will now appear as 'Split' on Donor CRM once the data is synced.
- **Item Donation Form Custom Text:** ability to add custom information at the top of the [item donation form](#).
- **Credit Card Verification Update:** when swiping a credit card as an Admin or Volunteer on behalf of a guest, when the name on the card does not match the name entered on the User Account in GiveSmart, a modal will appear for the admin to verify that the card is being entered on the correct account.



- **Global Admin:** for customers who own both GiveSmart Events & GiveSmart Fundraise, as an Organization Admin you can easily identify which admin in your organization have access to all GiveSmart modules. From the Org Hub > Admins page, view the Global User tag.



- **Bid History Report:** additional fields for Email and Mailing Address have been added to the [Bid History Report](#).
- **Ticket Purchaser Experience:** a ticket purchaser will no longer be able to skip creating

an account when purchasing a ticket. This will allow all purchasers to make attendee modifications and will alleviate any frustration in managing the ticket order post-purchase.

Bug Fix

- Resolved issue which blocked bulk item uploads from updating existing item details.
- Non-credit card payments on GiveSmart Events are now able to be viewed in GiveSmart Fundraise reporting for multi-module owners.
- Resolved issue on Donate Now form for instances where donors were logging in using credentials from old activities.
- Ampersand (&) in Event Names will no longer generate an error when manually adding a card on file as an Admin.
- Resolved issue with Org Hub custom reporting scheduler.

GiveSmart Fundraise

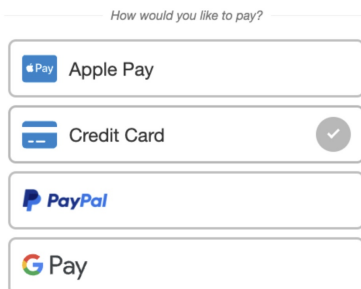
New Feature

- **Reporting Field:** Fair Market Value (FMV) is a new field that can be added to transaction reports and will flow through the automated data sync to Donor CRM.
- **Copy Activity:** Admin can now **copy** a Fundraising, Crowdfunding or Subscription activity saving time on having to recreate design elements.

Improvements

- **Payment Forms:** improved the payment section display for consistency between mobile & desktop views.

How would you like to pay?



The image shows a mobile payment selection interface. At the top, the text "How would you like to pay?" is displayed. Below this, there are four rounded rectangular buttons stacked vertically. The first button contains the Apple Pay logo and the text "Apple Pay". The second button contains a credit card icon, the text "Credit Card", and a grey circle with a white checkmark on the right side, indicating it is the selected option. The third button contains the PayPal logo and the text "PayPal". The fourth button contains the Google Pay logo and the text "Pay".

- **Solicit Name Updated:** for customers who own both Fundraise and Donor CRM, the Solicit Name has been updated to Activity Type and will display as Fundraising or Crowdfunding.
- **Events Activity on Campaign Landing Page:** for customers who own both Events & Fundraise you can now include your Events paid revenue on a Fundraise **campaign landing page**.
- **Delete Global User:** for customers who own both Events & Fundraise when a Global Admin is deleted from Fundraise, this will demote this same admin in Event to a general User. Note, to delete a Global User a ticket will need to be submitted to our Support team.

Bug Fix

- When scheduling Crowdfunding keywords to go live in the future, the creating teams feature is no longer disabled.
 - Restored ability to delete non-Global Users.
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GiveSmart Donor CRM

New Feature

- **Soft Credits:** Can be added to **gifts** as a percent or dollar amount of the donation.
- **Custom Reporting:** Create **custom reports** using all available fields in GiveSmart Donor CRM to find the insights you need to succeed.
- **Tribute Gifts:** Ability to add an **in honor or in memory gift**.
- **Households & Groups:** Create a **Household or Group** within GiveSmart Donor CRM to view relationship metrics between individual contacts.

Improvement

- **Type Ahead Addresses:** when entering addresses in the Address 1 field, completed address suggestions will appear. By selecting an address, the remaining address fields will populate.
- **Search Function on Thank You Letters:** the ability to search on thank you letters, end of year thank you letters and pledge thank you letters has been added, as well as the ability to sort alpha numeric on additional columns within the table.

Bug Fix

- Required an address to be selected as the primary address when merging contacts.
 - Removed the ability to issue the same name for custom fields.
 - Removed an additional comma after the State/Province within the address block merge field.
 - Magic links no longer require the email to be entered exactly the same, they are now case in-sensitive.
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