

2024 Q1

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Jan 1 - Mar 31

GiveSmart Events

New Feature

- **GiveSmart Item Shop:** GiveSmart has a new partnership which offers a curated, best-selling, highly-vetted collection of vacations, sports & memorabilia, experiences and jewelry to help you maximize revenue at your fundraising event. View more information about the [item shop here](#).

Improvements

- **GiveSmart Events User ID:** within the user details page, a new ID Field is visible allowing organizations who own Donor CRM to easily reference a user's Events ID.
- **User Import Duplicate Identifier:** when uploading a guest list, if duplicates are detected, a popup will appear letting you know how many duplicates have been identified with a link to review.
- **Profile Management Improvements:** guided steps and links have been provided to purchasers who attempt to modify their existing contact information while completing a purchase. They are now redirected to their donor profile to apply any contact changes, thus eliminating the potential for duplicate accounts to be created.
- **Improved Ticket Experience:** ticket attendees and purchasers are provided additional guidance to assist with account creation.
- **Unassignment Email Notification Option:** you now have the option to either send or not send an **email notification** when unassigning a ticket.
- **Raffle Entries Report:** new fields have been added to the **Raffle Entries report:** Email, Phone, Username, Bid Number.

Bug Fix

- The attendee report will now properly display invitee and user records.
 - Bid numbers and custom field answers will now reliably appear within the User Details and Check-In screens.
 - User experience improved when a non-ticketed user is merged with an invitee.
 - More time is given to allow for the processing of large orders during checkout.
 - Phone number validator improved to ensure phone field is not left blank or partially completed by new users.
 - Ticket status filter logic on Users > Details page has been improved. Results will include or exclude the proper ticket statuses regardless of user or invitee status.
 - Resolved an error that occurred when an admin was attempting to update an unconfirmed guest's information during checkin.
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GiveSmart Fundraise

New Feature

- **Reporting Field:** Tax Deductible Amount (TDA) is a new field that can be added to transaction reports and will flow through the automated data sync to Donor CRM.

Improvements

- **Recurring Donor Email:** recurring donors with expiring credit cards will see new verbiage in the email which provides a more thorough explanation of their next steps to continue their donation.
- **GS Event Site Activities:** can no longer be deleted from GiveSmart Fundraise to maintain parity between the Events & Fundraise, however the ability to modify the campaign name and move the activity to a new campaign still persist.
- **Payment Method on Receipts:** the payment method variable has been added to donor's receipts and will showcase how their transaction is being paid. (PayPal, Apple Pay, Google Pay, or credit card w/ last 4 digits.)
- **Last Name Required:** on all offline donations.
- **Existing Activities Filter:** opening existing activities and choosing GS Event Sites will list all existing GiveSmart Event Sites that link to the dashboard in Events.
- **Global User Updates:** when a Global Admin's contact information or name is updated on GiveSmart Fundraise it will automatically update their single sign-on account in both Events & Donor CRM.
- **Password Security Improvements:** new passwords must now contain at least 8 characters, and include 1 of each of the following: 1 upper-case letter, 1 lowercase letter, 1 number, and 1 special character.
- **Payment Method on Report:** the payment method field is now included on the Donor CRM export file.
- **Email Improvement:** the Payment Method variable when included in a receipt or notification email, presents both the credit card type as well as the last 4 digits of the card number.
- **Year-End Receipts:** have been updated to align with the design of the individual transaction receipt.
- **Offline Donations:** the **offline donation form** now has a dropdown for Payment Method, allowing you to select from Cash, Check or Other.

Bug Fix

- User last names can not be entered using a blank space as the last name.
- When opting to include the live event section on a campaign landing page, this will now properly update the live hero section.
- When deleting an admin who is also a fundraiser with the same email address, this will no longer break their fundraiser login experience.
- Phone number formatting has been made consistent for creating and editing users.
- Copy activity user experience has been improved by providing error messages when improper field options have been selected.
- Campaign totals for existing campaigns align with reporting numbers.
- Preventative measures were added when attempting to enter a discount larger than the total transaction amount.
- Percentage discounts can not exceed 100% or subceed 0%.

- Resolved an error on user sessions who were interacting with Apply Pay.
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GiveSmart Donor CRM

New Feature

- **NCOA Report:** a new report allows you to pull all valid **national change of address** addresses from Donor CRM which can be used to provide to an external mailing provider.
- **Email Subscription Status:** able to create a **filter** to view the subscribed or unsubscribed status of all listed primary emails.
- **Email Campaigns:** you now have the ability to create ad-hoc custom **email campaigns** to send to individual or organization contact records.
- **Primary Email Designation:** for contact records with multiple emails, you can now designate a primary email address.

Improvement

- **Merge Field Options:** tribute fields and custom fields can now be merged into templates when sending thank yous.
- **Advanced Search Functionality:** the ability to perform an advanced search with filters has been added to: Send Thank You, Send Pledge Thank You, and End of Year Thank You pages.

Bug Fix

- Pages with date range filters will now filter as expected when one of the data fields is empty.
 - Removed the Household ID field from gift listing export.
 - When edits are made to the General Ledger, Thank You or Custom Fields, the information in the Campaign, Solicitation and Source ID fields will be retained.
 - Prevent duplicate campaign and solicitation method codes from being created through the automated data sync process.
 - Thank you letters will now display properly on iOS devices.
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