

YourCause CSRconnect Highlights

Available Now

Below is a subset of the full 2022 October Product Update Briefing.

LEGEND	
Generally available	●
Not available	
In development	◐
Add-in or customization	★

AVAILABLE MARKETS

US EMEA CAN APAC

CAPABILITIES + CUSTOMER OUTCOMES

Improved Outstanding Funds Resolution – *Evolve to Support your Goals*

We've updated our Stranded Funds Automation feature to prompt users to respond to transactions requiring action more quickly, helping clients reduce outstanding funds more efficiently.



Enhanced Board Membership Flow – *Evolve to Support your Goals*

With these updates, we've enhanced the user experience and expanded reporting by adding the ability to create custom questions and custom affirmations as part of the process when users are adding Board Memberships.



New Homepage Design – *Engage to Drive Impact*

Increased configurability through new Feature Widgets gives admins more control of the look of the Homepage, and the ability to surface up quicker access point to key functionality. End-users will benefit from a more modern, easy to use interface that is designed around driving engagement.



Increased Flexibility with Groups – *Engage to Drive Impact*

These new enhancements give both client admins and end-users more control on communications they receive from Groups. Group notification settings have been added to end-users' account settings, and client admins now have access to additional customization options for Group emails and enhanced notification controls.



Redesigned Incentives Redemption Experience – *Engage to Drive Impact*

To provide users with a more valuable experience with available Incentive balances, we enabled the ability for admins to setup custom tiles specific to their program needs. This allows incentive programs to be combined in unique redemption program groups, giving users a view of program details for each redemption group and unified view of their available remaining caps.



Improved Global User Experience – *Expand to Support Engagement*

A more localized user experience with the ability to add translations to custom text through the Volunteer section of the platform. When creating an event, areas where custom text can be set can have translations added as well.



Enhanced Incentives Management – *Evolve to Support your Goals*

Managing incentives needs to be intuitive and with these updates we've added additional charity information in the incentive management panel, event participation info for volunteer incentives and made navigating from program settings to management easier.



Coming Soon

Below is a subset of development efforts currently underway or planned over the next 3-6 months.

CAPABILITIES + CUSTOMER OUTCOMES	AVAILABLE MARKETS			
	US	EMEA	CAN	APAC
<p>More Flexible Management of Engagement Elements – <i>Evolve to Support your Goals</i></p> <p>As we continue to explore ways to further improve Engagement Elements, we will be focusing on key updates that will improve the admin experience. We will be creating an updated interface for Engagement Element management, including the ability to search by title, the addition of sortable column headers, ability to search by status, and finally, the ability to more easily adjust the order in which your Engagement Elements display.</p>	●	●	●	●
<p>Improved Search Results Accuracy - <i>Engage to Drive Impact</i></p> <p>When users execute a search to either give or volunteer, they expect results that they can trust and a personalized experience that will help them find what they are looking for. We will be enhancing our Search and Filtering capabilities with a more consistent user experience, updated search logic, new sorting capabilities, and easier "Save Search" access.</p>	●	●	●	●
<p>A More Personalized Experience – <i>Engage to Drive Impact</i></p> <p>With improved security standards comes an improved employee experience when encountering single sign-on (SSO) log in errors, including the ability to include company specific language providing clarity and improving the ultimate time to resolution.</p>	●	●	●	●
<p>Updated Checkout Flow Experience – <i>Engage to Drive Impact</i></p> <p>This update will consolidate the checkout experience, ultimately reducing clicks and leading to a faster donation experience for end users. We will also be looking at where we can surface up Matching Program information within the checkout experience to encourage participation. Finally, we will be optimizing the credit card checkout experience across our Global Partners.</p>	●	●	●	●
<p>Enhanced Proxy Access Configuration – <i>Evolve to Support your Goals</i></p> <p>Today for many companies it is important that employees can identify a colleague (fellow CSRconnect user) that should be able to access their account and complete actions on their behalf. With our latest updates we are making proxy access configuration more flexible, allowing customers to control which employees can setup proxy access.</p>	●	●	●	●
<p>Streamlined Vetting Renewals – <i>Expand to Support Engagement</i></p> <p>All international nonprofit organizations must go through a vetting process to ensure that they meet the legal and regulatory requirements to receive donation disbursements. We have productized that vetting application experience to make it easier and more accurate and next we will be exploring updates to make the vetting renewal process more seamless.</p>	●	●	●	●
<p>Rewards! Future of Matching Gifts & More – <i>Expand to Support Engagement</i></p> <p>The goal of our new Rewards experience is to provide both a replacement for the legacy matching gift functionality (keeping all the features and options you have today) while also building in some new elements as well. The new Rewards experience will provide an option to tie to your budgets and caps to use <i>alongside</i> your existing Incentive programs.</p>	●	●	●	●