

Software Updates - P2P - Version 3.2

Software Updates – April, 2018

This document summarizes the software changes deployed on TBD, 2018 for the Peer-to-Peer fundraising module.

Run your Peer-to-Peer campaigns from your Engaging Networks dashboard and consolidate your constituent information into one source that integrates with your offline databases.

Notable Additions

Event Activities Tool: <https://vimeo.com/260832634>

Event Activities allow you to better manage event day activities for your participants. Whether it is volunteers, or participation in the event at a specific location and date; activities provide a tool to schedule your supporters. The module presents the option during registration for participants to choose the date, time and location they will be volunteering, rappelling or bowling for your organization. Whatever you can imagine.

- Provide participants the ability to pick the date, time and location they will be volunteering, rappelling or bowling for your organization.
- Create an event schedule for all of your event day activities.
- Create volunteer roles and time slots.
- Duplication tool allows for efficient set-up.
- Time slot rules are configurable: Let your group leader choose for the team or let individuals choose their own schedule.
- Create team limits by restricting activity offerings by participant type or capacity.
- During registration, Group leaders or individual fundraisers can select from the activity you provide.
- Once your fundraisers have registered and selected activities, administrators can manage those assignments through the new activities tab in the Manage Fundraisers section; site administrators can edit or delete assignments.
- Run a report to get all activity sign-ups.

- Add a new Activity Widget to the Fundraiser Dashboard. Fundraisers can see their activity sign-up information when they login.
- Fully configure this widget with your own graphics and brand.

New Fundraiser Dashboard : <https://vimeo.com/260807183>

The fundraiser dashboard has been redesigned to provide your participants the tools they need to succeed.

- **New My Pages Tab:** Provides a clean interface for easy fundraising.
- **New Group Level Tab:** If a fundraiser is a member of a group, a new Group tab will appear. It provides tools to keep up with other group members.
- **Group Chatter:** Provides a community tool for fundraising groups to communicate within the platform. Members can post messages for all group members to see. This feature can be enabled or disabled at the Group level or by individual group. Rights can be given to group leaders to monitor posts.
- **Group Roster:** Allows group members to track fundraising progress for the group and individual members.
- **Team Leader Communications to Members:** Leaders of the Group can be issued rights to easily email group members individually, or as a team.
- **New Email Tab:** The email tab creates a dedicated area on the dashboard for fundraisers to send emails, add contacts and track fundraising activity.
 - **Create Contact Lists:** Fundraisers can create lists to target different groups- friends, family and coworkers. Adding a contact list to an email will send that email to everyone in the contact list at the same time.
 - **Contacts Upload CSV:** Fundraisers can now create and upload contacts to their fundraiser dashboard. Contacts are then saved within the fundraiser profile for use on all of your Peer- to - Peer sites.
 - **Send Separate Emails and Track Them:** Fundraiser emails are now tracked separately when sent in one email. All tracking appears on the new Fundraiser Dashboard Reports Tab.
- **New Report Tab:** Fundraisers can easily track which contacts they emailed, and of those they've emailed- who has visited and who has donated.

Offline Gift Form Management & Batch Upload: <https://vimeo.com/260133447>

- **Offline Gift Form Management:** Administrators can now manage the offline gift form from Setup Forms. You can now include all default supporter fields including your tracking code.
- **Administrative Batch Upload of Offline Gifts:** Site administrators can now batch offline gifts into a CSV file and upload them at one time into the P2P site. Gifts will be loaded with a pending status for final approval. Approvals can now also be performed in one step.

Fundraiser & Group Search Features: <https://vimeo.com/260133303>

- **Header Search:** Enable or Disable the new participant header search. This tool provides your donors and future fundraisers a quick tool for finding family and friends.
- **Improved Search**
 - For sites with groups the new advanced search dropdown lets your donors find just what they are looking for.
- **Improved Search Results**
 - Results include Group Leader names to help distinguish between groups with the same name.
 - Site administrators can now choose between two different search result layouts. The new list view provides a compact result list.
- **Search Improvements Ranking:**
 - Improvements have been made to the search result algorithm to return a better match and order, specifically when searching for a group.

New Feature

Donation Form Widget & Captcha :

- **General Donation Form Widget:** <https://vimeo.com/260132860>
The new General Donation Form Widget allows you to add your General Donation form to any page on your site. If your organization does not want your general donation form on your search results page; use the widget to add it to a page. Add a link from anywhere on your site to the form.
- **Donation forms CAPTCHA to forms:** <https://vimeo.com/260132181>
Easily add CAPTCHA to your donation forms.

Administration & Operations - Reports

- **Site Folders:** Administrators can now organize their Peer-to-Peer sites into custom folders.
- **Control Tracking Codes:** Sitewide tracking codes are now available for your custom codes in the Options | Social configuration area.
- **Relationships Between Sites - Previous Site:** Administrators can now create a relationship between past and new sites. This relationship will enable future features in the software.
- **Reports | Activity Enrollment:** This report details event activity assignments.
- **Reports | Event Activity Check-in:** This report will help support your event day by providing the detail of who signed up for what activities and provide extra slots for walk up attendees.
- **Browser Notification:** Now appears for outdated browsers.

Functional Improvement

Administration & Operations

- **Addition to Go Live Checklist - Require Email Sender:** The Go Live checklist now includes a requirement to supply your default email sender for the site.
- **Administration User Interface Change:** The payment gateways administration area can now be found in the Properties area.
- **New Manage Groups Tab Interface:** Improvements have been made to the Manage Groups interface. Tabbed display provides easy access to all group information.
- **Manage Fundraisers Overview:** Registration Fee has been added to this display.
- **Manage Fundraisers:** Total raised amount has been added to the main view.
- **Menus & Pages | Page Edit:** An 'apply' button has been added to this form enabling an administrator to save changes without closing the editor.
- **Event Details | Discounts:** Display is now sorted by discount name, code, discount, usage, and state.
- **Going Live:** A warning has been added to the process checklist for taking a site live to ensure that your payment processor is also live.

Administration & Operations - Reports

- **Donation Detail Report | Columns Added:** Added full donor address
- **Group Level Summary Report:** Summarizes number of groups, total raised, total fees paid, number of fundraisers reaching goal and the number of fundraisers by level.
- **Donation Detail Report | Filters Added:** Ability to filter by donation status has been added to the report.
- **Group Detail Report | Column Added:** Total Registration Fees collected has been added to the report.
- **Registration Detail Report | Columns Added:** Group Level and Group Name hierarchy has been added to the report.
- **Site Summary Report | Column Added:** Refunded column has been added to the report.
- **Activity Set-up Report:** This report will display the activity structure you entered.

Advanced Fundraising

- **Improvements to tasks list labels:** Improvements have been made to the default Fundraising tasks list text to be more concise and direct your fundraisers to take best practice actions.
- **Admin | Setup Forms | Registration Form Thank You Email:** Receipt Link variable added to the VAR pop up on event driven registration thank you emails. This allows you to insert the receipt into this thank you email for event sites with a fee payment.

User Interface

- **Ability to Order the Group Options on the Registration Form:** Administrators can now order the group options that automatically appear in the registration process.
- **Ability to Start Registration with a Group Preselected:** When selecting 'Join this Group' from a Group fundraising page, new registrants will be placed into the registration process with the Group to join preselected.
- **Group Registration Improvements to UI Flow:** Improvements have been made to better display group options on sites where multiple groups are configured on the same level.
- **Change 'New Password' language:** Language has been updated to provide users with more clear instructions.
- **Change Default Text on Registration Flow:** Language has been updated to provide users with more clear instructions.

- **Search Improvement | Display of Pages That Do Not Take Donation:** Pages that do not allow donation now have their own label for the button in the search results. 'View' is the default text.
- **Field Type Settings:** Administrators can now define the field type when editing fields on a form. This allows the admin to create or select another type if needed.

Bug

The following issues have been resolved.

Administration & Operations

- **Admin | Setup | Forms:** Fields added to forms, and then removed from the form, are not being show for re-addtion to the form.
- **Admin | Setup | Forms:** When a drop down select question was removed from a form, and then the question was updated in page builder, and then re-added to the form – the question type was lost and the field would not appear as a drop down.
- **Admin | Manage | Fundraisers | Payments tab:** Action buttons on payments are not working.
- **Admin | Manage | Payments Add offline donation:** Button not working from this area.
- **Admin | Options |Social:** Bug saving the default email address.
- **Admin | Manage Payments:** Errors are thrown when attempting to move a donation from a group or fundraiser page to the general donation page.
- **Admin | Manage Fundraisers | Fundraiser Search:** Cannot search by email
- **Forms:** Untagged fields with select values are not being pulled through to a Peer to Peer form.
- **Admin | Setup Forms | Registration Form:** Adding questions to the form was including Legacy question types in the list. Legacy questions do not work on the form and therefore caused errors. They have been filtered out and only Page builder questions will be available for inclusion.
- **Reports | Registration & Fundraiser Detail:** Hidden fields with or without default values are not included in the reports.
- **Reports | Fundraiser Detail:** Included deleted group rows, causing duplicate rows in the report.
- **Setup Social Default Email Sender:** Default email sender list is not getting updated with deletes from the main sender area.

User Interface

- **Login:** 'Forgot email I used to sign up' is not directing to next step in Login Form.
- **Donation Forms:** Billing address is different than Address | Form improvements regarding Country Field. The form now follows the rules for Country that you setup on your General Donation form.
- **Forms User Interface:** Space between the fields has been reduced.
- **Forms User Interface:** Required validations do not work on check box questions.
- **Fundraiser Profile:** 'Default Person' image missing on some sites.
- **Fundraiser Profile:** System was allowing a fundraiser to delete their personal photo without replacing it with another or the default, resulting in a missing image.
- **Questions:** Changing a question field that is of type select to display as buttons does not work.
- **Registration:** Event Site Registration with no fee on participant type but an additional donation is made | In this case, if a registrant entered a bad credit card and the donation failed, the system was not alerting them to the issue.
- **Registration:** In some cases, partial registrations were created which prevented some fundraisers from being able to complete registration.
- **Custom Domains:** When using a custom domains, the 'login as a fundraiser' tool does not work.
- **DIY Multi-Page Site Waiver:** Using the waiver feature was causing a never-ending loop for a fundraiser trying to create a second page.
- **Page Totals:** When a registrant pays a fee and registers, and fees are included in site totals, the amount raised on the fundraiser page does not show the amount until a donation is made to this page.
- **Image Library:** From the fundraiser image tool, deleting a folder fails.
- **Fundraiser Dashboard:** Team Leader cannot email Team donors.