

2022 April Product Update Briefings

YourCause® CSRconnect® Highlights

In this April's Product Update briefing, you heard our product experts give us a look at CSRconnect functionality that has recently been released and is available now, as well as a preview of exciting enhancements that are coming soon. Our current priorities for developing CSRConnect are to continue to build and enhance features that **Evolve the Product Through Continued Maturation**, help customers **Expand With a Global by Design Approach**, and **Engage Users with Increased Innovation**. Below, you'll see a quick snapshot of the near-term focus we have under those three Key Themes.

Key themes for CSRconnect and near-term focus

 EVOLVE THROUGH CONTINUED MATURATION	 EXPAND WITH A GLOBAL-BY-DESIGN APPROACH	 ENGAGE USERS WITH INCREASED INNOVATION
<ul style="list-style-type: none"> Increased security and scalability Improved self-service capabilities with internal and external tools Shortened disbursement times with increased processing efficiency 	<ul style="list-style-type: none"> Increased global partner integrations Amplified partner ecosystem for global volunteer opportunities Enhanced translation options and global-by-design experience 	<ul style="list-style-type: none"> Improved Core User Experience Enhanced engagement with Microsoft Teams integration Increased API access and capabilities

Available Now

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

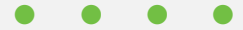
LEGEND	
Generally available	●
Not available	○
In development	◐
Customer Request	★

AVAILABLE MARKETS

CAPABILITIES + CUSTOMER OUTCOMES	US	EMEA	CAN	APAC
IMPROVED PERFORMANCE AND SECURITY – Evolve Through Continued Maturation Upgraded the CSRconnect user experience to Angular 12 to improve platform performance, provide a more secure solution, lay the foundation for faster development, and allow for earlier error identification.	●	●	●	●
INCREASED EFFICIENCY REDEEMING INCENTIVES ★ – Evolve Through Continued Maturation Reduced time spent redeeming multiple manual incentives within the same Manual Incentives Rule by enabling the selection of multiple incentives to give to a single charitable organization. Added the ability to see expiration dates for manual incentives during the redemption process.	●	●	●	●
ENHANCED SELF-SERVICE FOR YOUR COMMUNITY ★ – Evolve Through Continued Maturation Introduced the ability for clients to customize the look & feel of their community and improve user communication by moving design and message banner settings to the Client Admin Panel.	●	●	●	●

SIMPLIFIED PREVIEWING ENGAGEMENT ELEMENTS ★ – Evolve Through Continued Maturation

Streamlined the Engagement Element editing experience by adding the ability to preview, share, and manage saved engagement elements. Users can now preview the live Engagement Element page and copy the Engagement Element URL or ID from the edit screen.



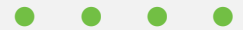
INTRODUCED ADMIN APPROVALS FOR PROJECTS – Evolve Through Continued Maturation

Extended admin approvals to include projects allowing administrators to review and approve projects before they are posted (individually or in bulk). Added the ability for administrators to manage project emails and send messages to project creators through the Opportunity Manager.



STREAMLINED INTERNATIONAL VETTING – Expand With A Global By Design Approach

Increased efficiency for vetting international nonprofits by creating a guided application process which ensures complete information and reduces compliance decision time, making it faster and easier for nonprofit organizations to be part of the Global Giving Network.



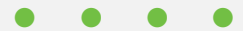
VOLUNTEER + GIVE: ADDED VISIBILITY FOR OPPORTUNITIES – Engage Users With Increased Innovation

Improved access to giving and volunteer opportunities through the Charity Page and Search Organizations by adding the ability for a user to make a donation through the charity page, view upcoming volunteer opportunities, and see details for volunteer opportunity event locations.



INCREASED PARTICIPATION WITH CALENDAR INVITES – Engage Users With Increased Innovation

Integrated calendar invites in Volunteer Event emails making it easier for volunteers to remember when they signed up to volunteer by adding their shift to their calendar of choice. Users can add volunteer shifts to their calendar, update the shift when the event changes, and remove the shift when participation is removed.



ADDED FLEXIBILITY FOR BOARD MEMBERSHIP ROLES – Engage Users With Increased Innovation

Extended board membership roles to collect additional data for “other” membership roles by allowing users to enter a custom Title for their board membership role.



Coming Soon

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

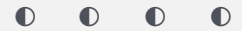
CAPABILITIES + CUSTOMER OUTCOMES	AVAILABLE MARKETS			
	US	EMEA	CAN	APAC
<p>ENHANCING INFRASTRUCTURE & PERFORMANCE OPTIMIZATION – Evolve Through Continued Maturation</p> <p>Migrating hosting services to Microsoft Azure, moving behind an enterprise level firewall, and optimizing performance by improving the reliability of client-facing data feeds and reporting capabilities. This migration improves security, supportability, and scalability while reducing the technical footprint enabling a more performant product.</p>	🕒	🕒	🕒	🕒
<p>IMPROVE FUNDS DELIVERY WITH STRANDED FUNDS AUTOMATION – Evolve Through Continued Maturation</p> <p>Improving efficiency by empowering users to respond to transactions requiring action more quickly to minimize stranded funds due to uncashed checks. Users will be prompted to reissue the donation payment or to choose a new charity to redirect their donation to ensure their donation reaches their charity of choice. Clients will also designate a default charity to be used when users do not take an action on stranded funds removing the outreach and manual intervention currently required for clients.</p>	🕒	🕒	🕒	🕒

NEW TOOLS AVAILABLE TO DRIVE BETTER RESULTS – *Evolve Through Continued Maturation*

Increasing supportability and scalability by delivering tools that enable your customer success manager to self-serve with increased configuration options and tools behind the scenes. These tools reduce the time to resolve common requests such as updating programs, redirecting pledges, merging HR accounts, and moving a group to a different program.

**CONSOLIDATED CLIENT ADMIN PANELS – *Evolve Through Continued Maturation***

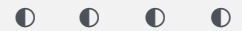
Streamlining the admin experience by removing unnecessary menu items from the Legacy Admin screen and focusing on migrating Legacy Admin Panel settings to the Client Admin Panel.

**BROADENING INTERNATIONAL CAPABILITIES ★ – *Expand With A Global By Design Approach***

Expanding the Global Good Network through partnerships with payment processors to increase our global giving and volunteering opportunities. We are currently working on an integration with Haus des Stiftens (Germany) which has enabled ~44k German nonprofits in the platform for volunteering. We are continuing to work to enable credit card giving in Germany soon.

**GROWING THE PARTNER ECOSYSTEM VIA APIS – *Engage Users With Increased Innovation***

Extending our external APIs to enable additional technology partnerships to power things like virtual volunteering, impact reporting, office integrations, DEI solutions, and more.

**IMPROVING THE USER EXPERIENCE – *Engage Users With Increased Innovation***

Focusing on improving the end user experience for CSRconnect to resolve product inconsistencies, improve accessibility, and incorporate a global by design mindset while increasing platform engagement and improving workflow efficiency. Our near-term focus includes addressing inconsistencies in the user experience, modernizing Community Home, updating Incentives to include Match capabilities, extending Engagement Element capabilities, and improving the mobile user experience.

**DRIVING ENGAGEMENT FROM COMMUNITY HOME – *Engage Users With Increased Innovation***

Bringing key information to the forefront to drive increased engagement by directing users to new opportunities, exposing favorite organizations, improving access to Engagement Elements, and presenting a more modern look and feel.

