

YourCause CSRconnect Highlights

Available Now

Below is a subset of the full 2023 April Product Update Briefing.

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

AVAILABLE MARKETS

CAPABILITIES + CUSTOMER OUTCOMES

US EMEA CAN APAC

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.

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Connected Volunteer and Give Experience – Evolve to Support your Goals

We've created a more connected experience by providing users with a more holistic view of actions they can take throughout the donation and volunteer registration process. Now, users will see a Donate Now button added onto Volunteer Events if the charity is eligible for receiving donations, and upcoming Events & Projects have been added to the Charity Page users see when making a donation.

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Enhanced Group Admin Controls – Evolve to Support your Goals

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.

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Increased Configurability in Donation Flow – Engage to Drive Impact

We're giving clients and their employees more flexibility in the donation process. Clients can now customize their suggested donation amounts across payment types, and donors can provide an alternate email or address to share with nonprofits outside of what information is tied to their profile. We've also made improvements to the Designations users can select from when making a donation, including the ability to add multiple designees and a new designation type – "Donation as a Gift".

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Improved Administrative Experience – Evolve to Support your Goals

To improve the administrative experience, we've extended the session duration within the client admin panel, enabling admins to spend more time on complete tasks before timing out. The new timeout window is two hours. We've also increased the flexibility in managing Engagement Elements (EEs) by adding the ability to search for EEs by title, sort EEs by column headers & filter by status, adjust homepage display order, and the ability to assign EEs to multiple segments.

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Enhanced User Control on CRA Surveys – Evolve to Support Your Goals

We've made it easier for employees of our banking clients to record crucial regulatory data for the Community Reinvestment Act. Employees will now be able to use and update previously completed answers for CRA surveys on new entries, saving them time.

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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
New Engagement Element Designer – Engage to Drive Impact As we continue to explore ways to further improve Engagement Elements, we are thrilled to announce that the new Engagement Element Designer will be available soon to all CSRconnect customers. This tool provides a new launching point for building out complex Engagement Elements and is built around drag and drop functionality.	🕒	🕒	🕒	🕒
Expanding Giving Options in Germany – Expand to Support Engagement Last year, we expanded giving and volunteering opportunities with German charities through a partnership with Haus des Stiftens. We support volunteering and credit card giving functionality today. We will soon launch support for companies to match employees' credit card and offline gifts to German charities. In this next phase, companies will be invoiced in US dollars, and payments to charities will be disbursed in Euros.	🕒	🕒	🕒	🕒
Streamlined Vetting Renewals – Expand to Support Engagement We're making it easier for international nonprofits to renew their giving eligibility status. NPOconnect will house a fully automated process for renewals, guiding applicants along the way with clear communication to ensure information is complete.	🕒	🕒	🕒	🕒
Streamlined Payment Distribution Workflows – Evolve to Support your Goals We intend to expedite remediation of donations that are put on hold for various reasons, like what's available today for reissuing or redirecting donations stalled due to stale checks. We also have efforts underway to streamline other key steps in the donation lifecycle. This includes work towards faster and smarter payroll file reconciliation and shorter, more predictable processing cycles for funding requests and disbursements.	🕒	🕒	🕒	🕒
Increased Visibility into Charity Funding Information – Evolve to Support your Goals New reporting functionality in the Client Admin Panel will enable customers to more easily see their charitable funding information. This self-service tool will provide visibility into funding information, including funding requests and disbursements.	🕒	🕒	🕒	🕒
Updated Checkout Flow – Engage to Drive Impact We're making it easier for employees to complete a donation and request a match. This updated user interface will reduce the clicks needed to complete a donation, leading to faster checkouts. Matching program information will be upfront in the donation checkout flow to encourage increased utilization of match caps.	🕒	🕒	🕒	🕒
Rewards! The Future of Matching & More – Evolve to Support your Goals 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. The new Rewards experience will provide an option to tie to your budgets and caps to use <i>alongside</i> your existing Incentive programs.	🕒	🕒	🕒	🕒