

2024 Q2

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April 1 - June 30

GiveSmart Events

New Feature

- **Campaign Site Settings:** within the org hub, admins can generate a report to review **campaign settings** across all campaigns within the organization.
- **Campaign Item Stats Report:** within the org hub, admins can generate a report to review **item details** across all campaigns.

Improvements

- **Save Option on Checkin:** details can be modified and saved on the Checkin page without needing to complete checkin for a guest by selecting the Save button.

Bug Fix

- Donate Items will now appear on the Items page when the Donate Page view is set to hidden.
- Merged attendees who also bought a ticket can now be unassigned from a ticket order.
- Out of memory error on the reporting dashboard has been resolved.
- The org hub will load properly when campaigns are missing a start date value.
- Donors paying via GooglePay or ApplePay will be able to see the proper \$0 processing fee when fees are configured to be paid by the organization.

GiveSmart Fundraise

Improvements

- **Global User Maintenance:** Global Users can now create, edit and delete other Global Users within their account.
- **Fundraise Signups:** will be excluded from the fundraise donor walls when there is no cost associated with them becoming a fundraiser.
- **Screen Reader Accessibility II:** for donors using a screen reader: labels on the drop-down menus for credit card expiration month and year, labels on tickets and items when increasing and decreasing the quantity and the sequence of tabbing through the CVV field and help link makes all make the user experience much clearer.
- **Screen Reader Accessibility I:** First Name, Last Name and Zip fields, when required will read more accurately when accessing a form from a screen reader.
- **Events Refunds Reflected:** on the Total Raised display within a campaign tile, refunds processed on GiveSmart Events activities will now be deducted.

Bug Fix

- Comments will now appear publicly on the public page.
- Donors will no longer receive the SMS confirmation text when adding a card on file for a charge later transaction.
- Team cards with no team captain will now display the proper keyword on crowdfunding activity pages.
- The refund button for PayPal transactions now appears on the transactions page within the 3 dot menu.

GiveSmart Donor CRM

New Feature

- **Duplicate Transaction Report:** easily search for duplicate transactions in Donor CRM by using the new **Review Potential Duplicate Transaction** report.
- **Bulk Edit Gifts:** ability to apply **bulk edits** for deleting, add/changing a field or removing a field from gifts.
- **Import Templates:** contact and transaction **import templates** have been provided that make importing your data to Donor CRM easy.
- **Data Settings:** on the **client settings page**, Donor CRM Admin can choose to review all manual and automated data prior to upload or allow it to pass through without review.
- **Data Import & Review:** data can now be manually **imported** and all automated and manual data can now be reviewed prior to being uploaded to Donor CRM.

Improvement

- **Date Range Filters:** date range filter options have been added to customizable reporting.
- **New Address Field Merge Options:** additional address field options have been added to Thank You and End of Year Thank You templates. Full Name, Salutation, and Salutation + Last Name can now be selected as merge fields.
- **Faster Gift Entry:** the manual **gift entry** experience has been optimized to allow for quicker field entry and review.

Bug Fix

- When applying a date range to search for a pledge, the list will now filter as expected.
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