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## Redesigning the Constituent Experience

Live Webinar: Neon CRM Constituent Login Portal

# Introductions & Housekeeping



**Sam Nyland**  
Product Marketing Manager



**Tyla Frazier**  
Professional Services Consultant

- 1 This webinar will be recorded!** You will receive a follow-up email with access to the recording.
- 2 We will be taking questions.** Please use the Chat function to ask questions.
- 3 We have additional resources & upcoming events for you.** We will be sending you supportive resources that relate to the Neon CRM Constituent Login Portal. We will also be sending you links to upcoming events that may interest you.

# Agenda

- **WHAT & WHY?**
- **WHY** should your organization switch to the new portal
- **Instruction:**  
What your organization needs to know before switching to the new portal
- **Product Training:**  
Administrative back-end experience & Constituent experience
- **Q&A**





**WHAT** is the Constituent Login Portal?

**WHY** should your organization use it?



- Maintain constituent trust & transparency
- Build rapport & gain insight
- Improve member & donor retention
- Increase recurring giving & membership upgrades
- Easy event registration process
- Easy access for editing & updating payment methods

# Why should your organization switch to the new portal?

1

## **Revamped Constituent Dashboard interface - it's modern & sleek!**

Constituents can easily update contact & payment information.

3

## **Easy self-service membership management and recurring giving**

2

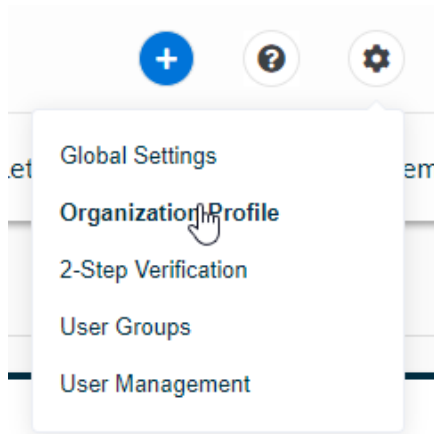
## **Easily download a receipt for membership and/or donation payments**

4

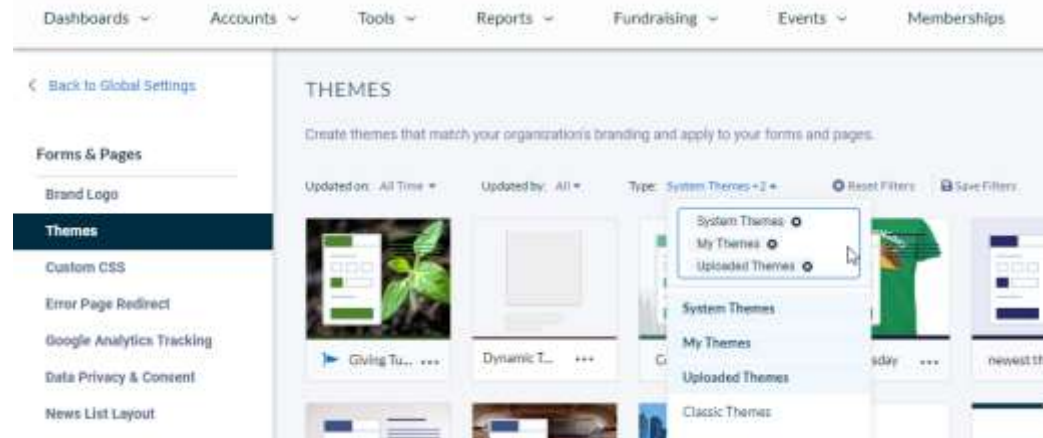
## **Enhanced Portal Dashboard with quick links and constituent statistics**

# What does your organization need to do before switching to the new Portal?

Organization Profile and double check that your EIN or CRA Number is correct.



Make sure that you have one of the new CRM Themes set as the default in your system.



# What do I need to do before I switch to the new Portal?

Constituent Portal Dashboard and find the “Interface Setting” section. Click the toggle button to turn on the New Portal, then click “Save” at the bottom of the page.

**Interface Setting** [Support Center Guide](#)

Change the Interface for the Dashboard, Memberships, and Donations pages on the constituent portal.

Updated Portal Interface



# Product Training

Post questions in Chat as we go, we'll either answer them during the demo (as the agenda allows) or revisit them at the end of the webinar.

Session recording and slides will be available tomorrow.



# Q & A

