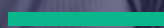


MAR



'24



Neon CRM Release Webinar

What's New!



Target Responsibilities for This Release



Executive Director



System Administrator



Events Coordinator



Development Director



Volunteer Director



Grant Manager

March 2024 **Key** New Features



**Generosity
Indicator**



**Grant Management
Improvements**



**Event
Improvements**

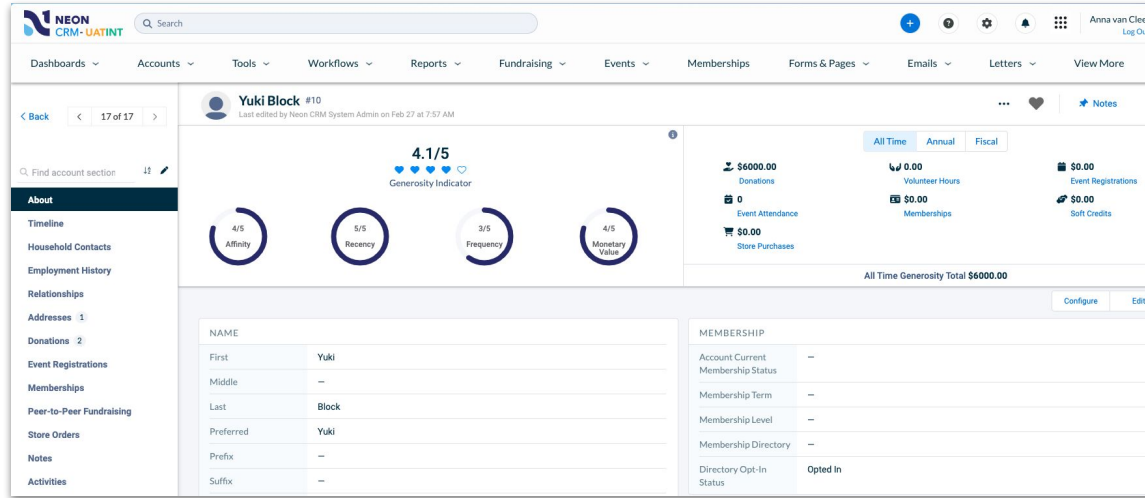
Generosity Indicator

Build a community of generosity by identifying and prioritizing accounts with the highest generosity potential



Nonprofit professionals are trying to connect with their constituent base and spend their time engaging with the constituents that have the highest propensity to give, but that information isn't easily calculated without leveraging technology to arrive at the answer.

The Generosity Indicator measures constituent generosity through Affinity, Recency, Frequency, and Monetary Value across our unified ecosystem. With scores from 1 to 5, it guides nonprofits in fostering deeper connections, elevating engagement, and boosting donations. You can leverage on Accounts as well as in Reports and Workflows!



[This Support Article](#) contains all the details!

Grant Management

Saving time managing the entire process from application to close-out.



Organizations are seeking ways to manage and report on grants to fund organization initiatives. Neon CRM supports this process, but it's not the perfect solution today.

We're improving the Grant Management capability in Neon CRM. For this release:

- Display pledge installments in pledge/donation table on grant detail
- Add Close Date Field to Grants

FUNDING			
TYPE	AMOUNT	DATE	ACCOUNT
Donation	\$100.00		Ma
Pledge	\$200.00/\$600.00		-
└ Installment	\$0.00/\$100.00		Ma
└ Installment	\$0.00/\$200.00		Ma
ACTIVITIES			
ACTIVITY	STARTS ON	ASSIGNED TO	ACCOUNT

Released: March 2024

Neon One Confidential and Proprietary.

New Events: Waitlists

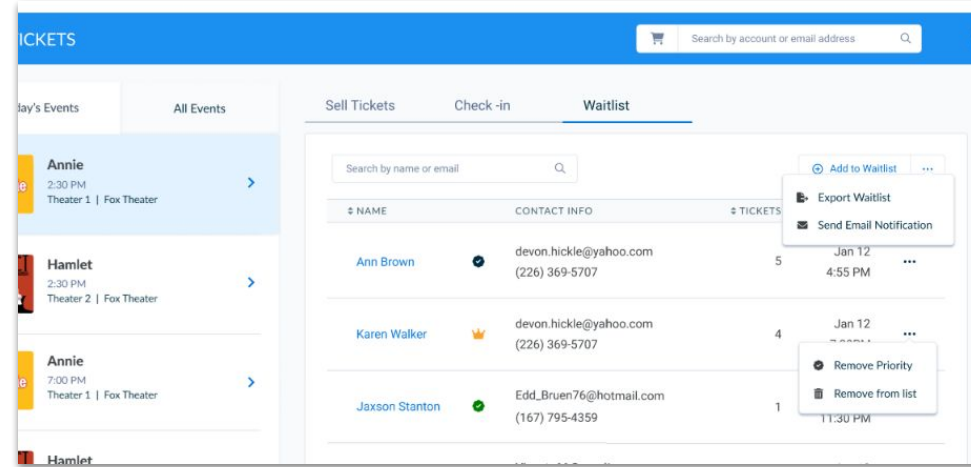
Prioritize attendees, manage capacity, and communicate effortlessly



Event organizers often face challenges in managing event capacities, particularly when demand exceeds available space. New events currently does not support managing prospective attendees on a waitlist.

We're excited to announce significant improvements to our new events capabilities in Neon CRM, particularly in addressing waitlist management. For this release:

- Easy sign-up options for prospective attendees to join waitlists
- Enhanced tools to view and prioritize waitlists, aligning with attendance objectives
- Customization options for waitlist communications, including emails and confirmation messages
- Capacity setting for waitlist entries, ensuring a manageable and positive experience for attendees



Released: March 2024

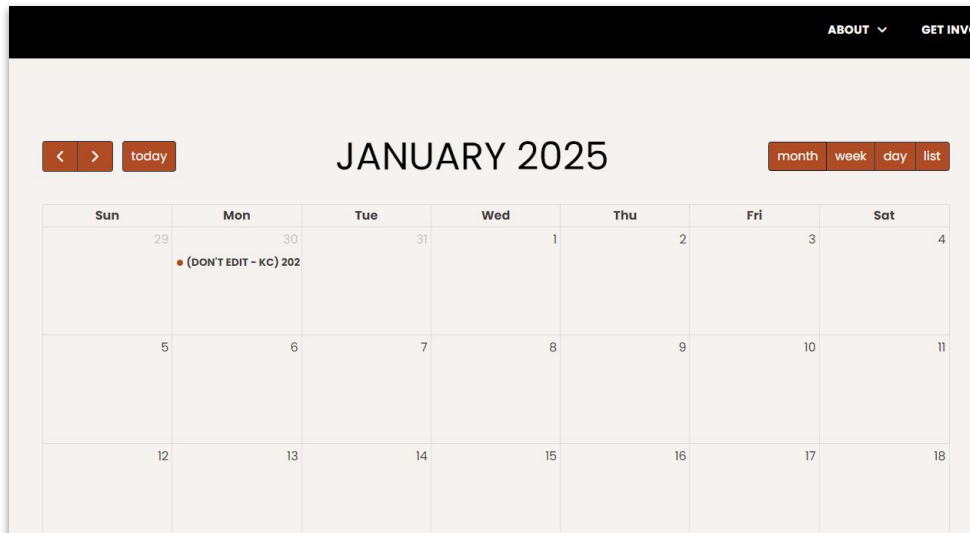
Neon Websites: Event Calendar Widget

Modern and sleek calendar widget for your Neon Website

Organizations with a large # of events throughout the year often face challenges in displaying the events in a concise and easy to consume manner for constituents.

Now organizations who leverage our Neon Websites product can easily embed their events using our calendar widget. Organizations will benefit from:

- A design that matches your theme and colors
- Allow your website visitors to change the format of the calendar dates as needed
- Automatically sync websites from CRM to the calendar

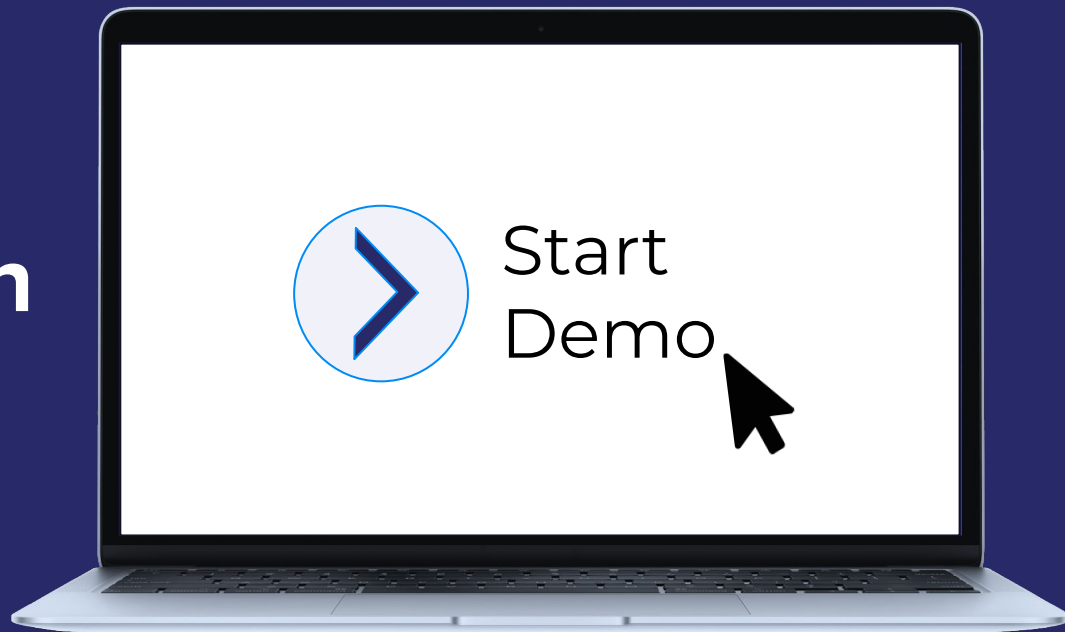


Other Features in the Release!



1. Preferred Name field available to add to New Forms
2. Allow files to be uploaded by users to account and transaction File Custom Fields
3. Open External Link Portal Pages in a new browser tab
4. Updated experience for the External Email Tracking page
5. Adding transaction history output columns to Household & Household Stats Reports
6. API v2.8 Release: includes Grant Close Date and Generosity Indicator fields

Live Demonstration



Benefits by Role



Executive Director

Assess constituents' history and generosity at a glance when preparing for constituent outreach



System Administrator

Generosity Indicator provides a shortcut to creating valuable workflows and reports targeting engaged constituents



Events Coordinator

Easy and detailed management of waitlists, including automated email tools

Assess the overall generosity of event attendees



Development Director

Quick creation of segmented, automated campaigns based on Generosity Indicator scores



Volunteer Director

Assess volunteer's overall generosity at a glance when preparing for constituent outreach



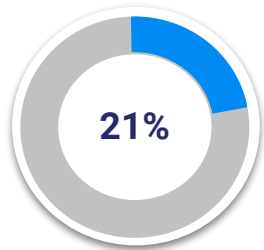
Grant Manager

See installments tied to grants and have a designated place for your real close date

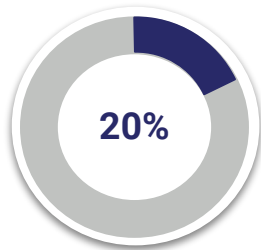
**Features You Want
to Know More About**



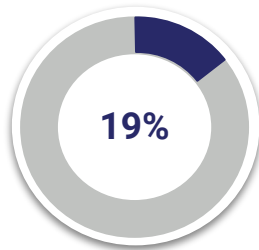
February 2024 Voting Results



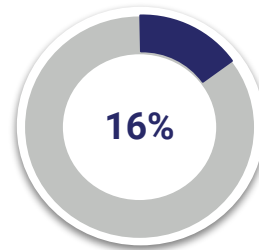
Pledge
Invoicing



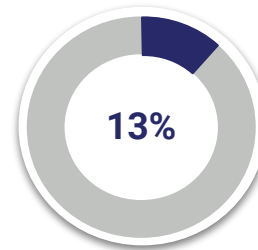
Workflows with
Custom Fields
and Dynamic
Dates



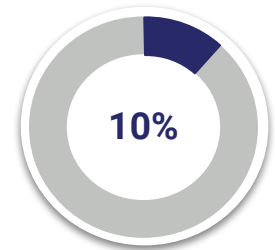
Account Match:
Address
Matching



Setting up New
Membership
Directories



Form Builder
for Dedicated
Tribute
Donation Form



Custom
Addresses
Types and
Reporting

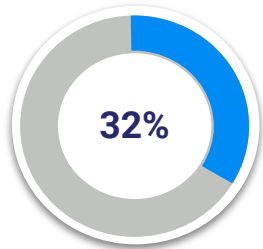
Live Demo



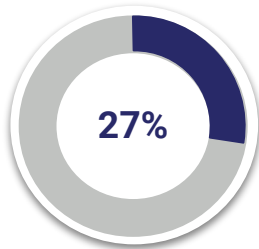
A string of warm-toned Edison-style light bulbs hanging from thick, dark ropes against a dark, blurred background. The bulbs are illuminated, casting a warm glow. The background is out of focus, showing more lights and some blueish tones in the upper right.

**What recently released
features do you want to
learn about next?**

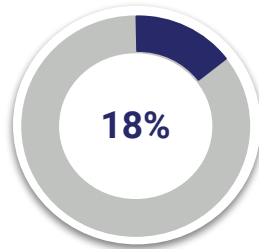
March 2024 Voting Results



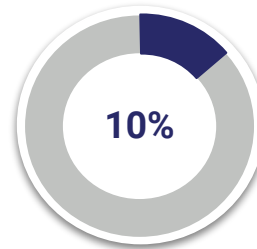
One-Click
Workflows



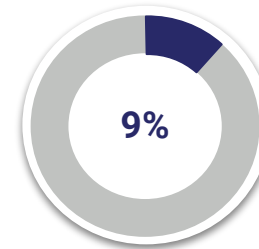
Advanced
Workflows:
New Address
Match



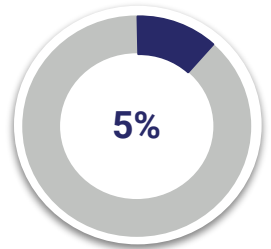
New
Constituent
Login Portal



Form Builder
for Dedicated
Tribute
Donation Form



Setting up New
Membership
Directories



File Upload on
Forms



ASK US QUESTIONS!

WHAT WOULD YOU LIKE TO ASK?



Thank you!

Join us in our next Product
Release Webinar!

