

JUL
—
'24



Neon CRM Release Webinar

What's New!



Target Responsibilities for This Release



Executive Director



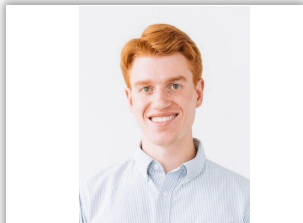
System Administrator



Events Coordinator



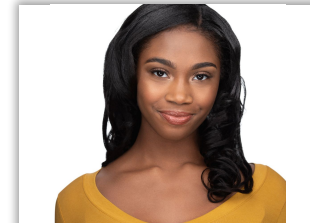
Development Director



Membership Director



Volunteer Director

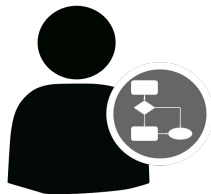


Marketing and Comms

July 2024 **Key** New Features



**Communication
Improvements**



**One-Click
Workflow**



**Event
Improvements**

Email Builder Improvements



Seamlessly create and manage marketing communications from a single intuitive interface

Neon One wants to provide clients with a unified communication tool that eliminates complexity and empowers an effortless engagement strategy with constituents. In this release, we are building on the email builder capabilities through:

- **Resending Emails:** Resend email to non-openers and resend a system email to a new email based on account update.
- **Image Improvements:** You can now make inline size adjustments.
- **User Experience:** We're improving the experience even further by adding "TEST" to test emails, improving list views with key information, supporting Email Link Authentication on an email-by-email basis, and more!
- **Import Manager Connection:** Add ability to trigger Donation Appreciation system emails via Import Manager.

The screenshot shows a 'Send Email' dialog box with the following fields and options:

- Email Name:** Laura Demo Email
- Audience Name:** Just Yuki (1 Recipient)
- When do you want to send this email?:** Two options: 'Send immediately' (selected with a blue dot and paper plane icon) and 'Schedule' (with a clock icon).
- ☒ **Automatically resend to non-openers**
Automated resend is only possible from 1-10 days after the Campaign is sent.
- Starts on *:** 07/23/2024 (with a calendar icon)
- Starts at *:** 10:00 AM (with a clock icon)
- Time Zone *:** (GMT-05:00) Central Time - Chicago (dropdown menu)
- Email Subject *:** Reminder: Did you miss this great email? 🍌 [[Tokens]] 😊
You can type { to insert a token in your subject line.
- Buttons:** Cancel (light blue) and Send (blue)

Released: July 2024

Neon One Confidential and Proprietary.

Additional One-Click Workflow



Reduce administrative burden and focus on your mission by automating repetitive tasks with ease

With 70% of organizations focused on *“improving inefficient processes,”*¹ saving time on administrative is crucial. Our aim is to make this easier with One-Click Workflow automation options. One-Click Workflows help organizations to leverage common workflows with limited set-up required so you can focus on what matters most – your mission.

For this release, we're adding new One-Click Workflows:

- Advanced New Donor Welcome Series
- Membership Auto-Renew Disabled Follow-up

We're also adding a new One-Click Workflow placeholder Organization Token page that you can use in other places for easy repeatable content!

The screenshot displays the Neon One CRM interface. On the left, a sidebar titled 'ONE-CLICK WORKFLOWS' lists several automation options: 'New Donor Welcome Series' (Fundraising), 'New Member Welcome Series' (Membership), 'Lapsed Member Recapture Series' (Membership), 'New Volunteer Application Follow-Up' (Volunteer), 'Recurring Donation - Credit Card Expiration Reminder' (Fundraising), 'Auto-Renew Membership - Credit Card Expiration Reminder' (Membership), and 'Recurring Donation Schedule Disabled - Follow-Up' (Fundraising). Each item includes a brief description of the workflow. On the right, the 'ORGANIZATION TOKENS' page is shown, which allows users to configure tokens for emails, letters, and web pages. It includes sections for 'Organization Branding' (Brand Logo, Brand Font and Colors, Organization Tokens), 'Remind me to update this page' (with a toggle for 'Enable Notifications' and a dropdown for 'Notification Frequency'), 'Tokens' (with fields for 'Executive Director Name' and 'Executive Director Email'), and 'Organization Mission Statement' and 'Supporter Impact Statement' (both with text input areas).

Released: July 2024

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Add-On Donations for Events

Capture donations seamless in event checkout



Next Gen Events has not had the ability for constituents to add donations to their orders causing challenges for organizations to meet fundraising goals for event registrations.

Next Gen Events will now give organizations the ability to customize the donation entry from a single input or multiple choice options on suggested amounts to help achieve fundraising goals for any event.

The screenshot displays the 'TICKETS' checkout page. On the left, the 'Contact Information' section includes an account lookup field, first and last name fields (filled with 'Robin' and 'Muschal'), a 'Submit as company' checkbox, and an email address field (filled with 'robinuschal@gmail.com'). Below this is the 'Add a Donation' section with buttons for '\$25', '\$50', '\$100', '\$250', and an 'Other amount' field. The 'Payment Details' section shows a 'Payment Type' dropdown set to 'Credit Card', a 'Card Information' field with the number '1111-1111-1111', and a 'Billing Zip/Postal' field with '63119'. On the right, the 'Order Summary' section lists items: 'Annie' (4 tickets, \$100.00), 'Adult' (2 tickets, \$15.00 each), 'Child' (2 tickets, \$15.00 each), 'Phantom of the Opera' (4 tickets, \$100.00), and a 'Donation' of \$25.00. At the bottom, there is an 'Empty Cart' link, a 'Apply a Discount Code' field with 'SAVE50' and an 'Apply' button, and a final total showing a subtotal of \$225.00 and discounts of \$0.00.



Convert an Order to a Donation

Efficiently manage registrations to convert to donations when registrants can't attend

Next Gen Events has not had the ability for event coordinators to convert an order to a donation causing challenges for organizations to meet fundraising goals for event registrations.

Next Gen Events now gives organizations the flexibility to convert an order / registration to a donation in the event that an attendee wants to use their funds spent toward a donation.

TICKETS

Refund balance to :

☐ Original Payment \$ 0.00

☒ Donation \$ 76.60

Contact Information

Daniela Mandera
dmandera@example.com

Payment Details

Payment Type *
Credit Card

Card Information
Number/Exp/CVC (locate component)

Billing Zip/Postal
63119

Order Summary

	Phantom of the Opera Sep 3 2022 at 7:00PM 2 Tickets	- \$51.60
Adult	Section 1 Row A Seat 1	- \$25.00 Refund and Release
Adult	Section 1 Row A Seat 2	- \$25.00 Refund and Release
	Refunded Ticket Fees Ticket fees selected to include in refund 4 Tickets	- \$1.60
	Donation	\$25.00
Grand Total		\$76.60

[Back](#) [Refund and Release](#)

Specify Attendees Next Gen Events

Reduce administrative burden and boost potential donor engagement by attendee data collection



Next Gen Events has not had the ability for registrants to add attendees to tickets so that registrants can specify who is actually attending an event and event organizers to collect this information accurately.

Next Gen Events now gives organizations the ability to set event parameters to collect attendee information during the checkout process for event(s), improving communication and increasing fundraising opportunities. With this release:

- Attendees will receive confirmation and reminder emails
- Event organizers can skip the attendee additions during admin sales / check out
- Event organizers view entire attendee list

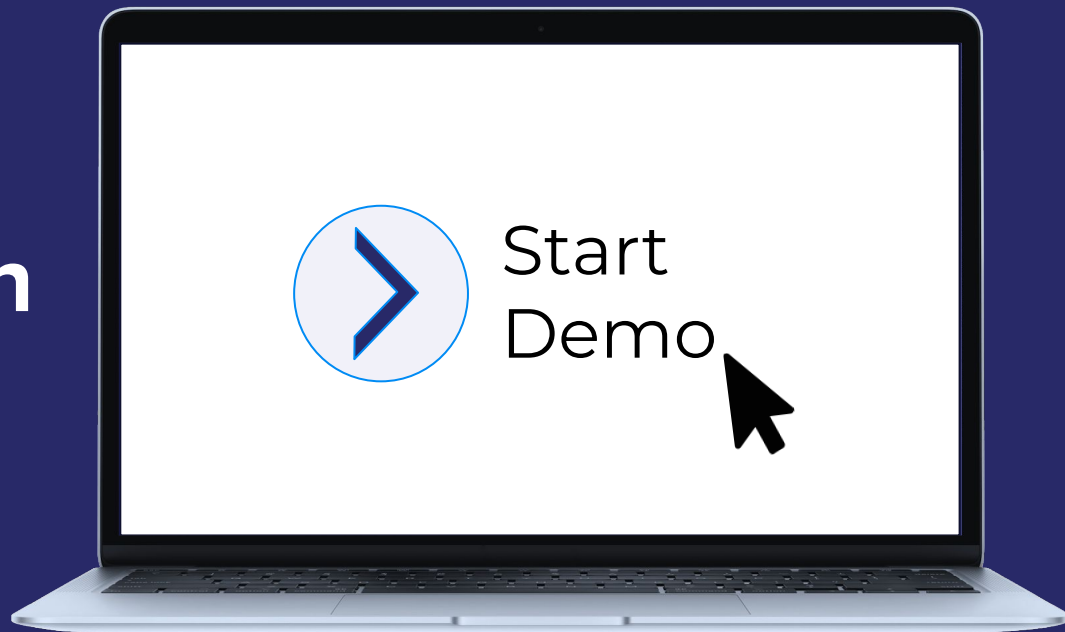
The screenshot shows a mobile app interface for event registration. At the top, it says 'REGISTRATION'. Below that is a navigation bar with a back arrow, 'Return to ticket selection', and '1/10 Tickets'. The main content area shows a ticket for 'Annie' on 'Sep 3 2022 at 7:00PM'. Below the ticket information, there is a green checkmark icon and the text 'Ticket 2', 'Adult - Section 3 | Row 3 | Seat 2', and a wheelchair icon with the text 'Wheelchair Seat'. The form fields are: 'First Name *' with the value 'Claire', 'Last Name *' with the value 'Danes', and 'Email Address *' with the value 'clairestevens@gmail.com'. At the bottom, there are 'Back' and 'Next' buttons.

Other Features in the Release!



1. One Occurrence Default Selected in Next Gen Events
2. QuickBooks Online Canada Integration Support
3. User Interface Improvement for Manage Addresses Portal Page
4. Mobile Navigation Menu Updates (quick link to NG Events Sales & Check-In)
5. New setting to opt members out of membership directories by default
6. Display account ID in Household Contacts account section tiles
7. Copy Activity action
8. Ensure that existing address fields overwrite incoming blank values when addresses merge

Live Demonstration



Benefits by Role



Executive Director

Manage key information and stories for your nonprofit through Organization Tokens.

Intuit QuickBooks Online for Canada Integration.



System Administrator

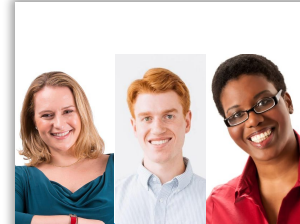
Improve efficiency through one-click workflows.

Ability to copy an activity.



Events Coordinator

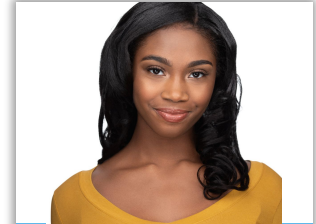
Leverage add-on donations in Next Gen Events along with Group Registrations and converting and order to a donation.



Constituent Engagement

Leverage new one-click workflows to save time on repetitive tasks.

Default Directory Opt-Out for members.

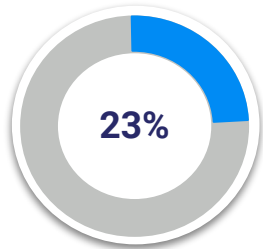


Marketing and Comms

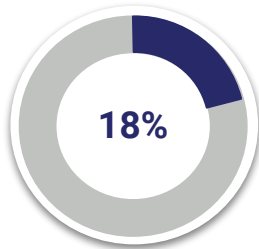
Resend unread emails, resize photos, and leverage improved email link authentication options for emails.

Features You Want to Know More About

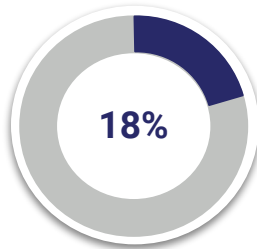
May 2024 Voting Results



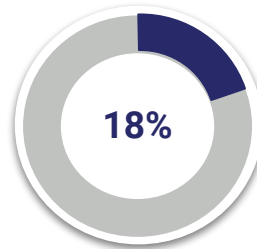
Setting up New
Membership
Directories



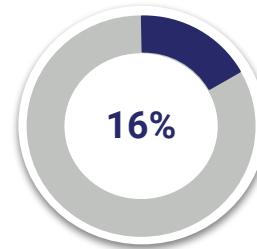
Allocating
Donor Covered
Fees



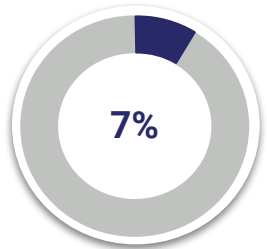
Multiple
Recurring
Giving
Frequencies



Content Library
Management



Workflows to
fill in custom
fields with
dynamic dates



Monthly
Membership
Installments

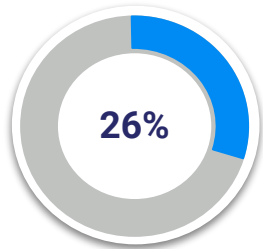
Live Demo



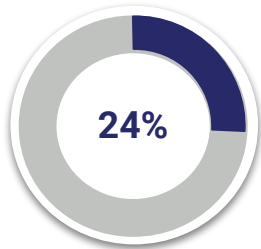
**What recently released
features do you want to
learn about next?**



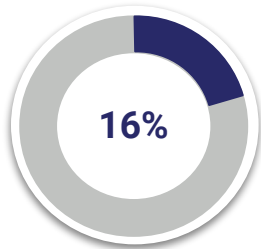
July 2024 Voting Results



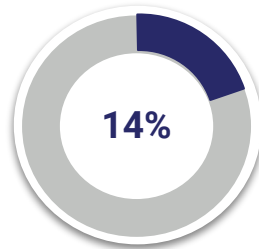
Campaign
Improvement
Recap



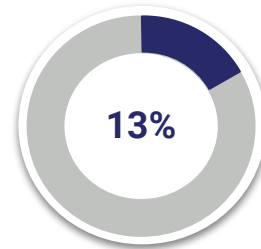
Custom
Address Types
and Reports



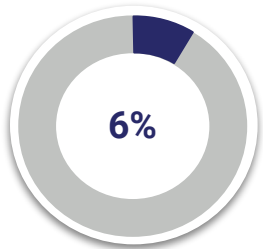
Grant
Enhancement
Recap



Multiple
Recurring
Giving
Frequency



Workflows to
fill in custom
fields with
dynamic dates



Paying Off Pay
Later Online



ASK US QUESTIONS!

WHAT WOULD YOU LIKE TO ASK?

Interested in driving New Donor Acquisition through P2P?

Join us in our
[Neon Fundraise Group Demo!](#)

WEBINAR

Neon Fundraise Group Demo

Not Anna Van Cleef? [Click Here.](#)

I authorize Neon One to keep me informed with occasional updates about products, services and events. My data will be handled according to Neon One's [privacy policy](#).

REGISTER

DATE/TIME

August 14th, 2024

1:00 – 1:30 p.m.

Online

HOSTED BY



Marienis Pelayo
Product Marketing Manager



Kat Murphy
National Sales Director of
Fundraise & Giving Days

Discover the Power of Neon Fundraise

Join us for a live group demo and see how Neon Fundraise can help you revolutionize your fundraising efforts. Learn how to create donor-centric pages that not only drive engagement, but also boost donations.

We will guide you through creating custom, brandable pages that reflect your organization's unique voice, designing modern, visually appealing peer to peer pages, leveraging gamification to inspire friendly competition and amplify impact, along with many more advanced features.

In this 30-minute session, we'll give you a tour of the platform's key features and show you how they work together to help you achieve your fundraising goals. We'll also leave time for questions, so you can get the most out of the demo.

Take your peer-to-peer fundraising to the next level. We look forward to seeing you there!



Thank you!

Join us in our next Neon CRM
Product Release Webinar!

[Register here!](#)



Key Resources



- [2024 Improvements for Neon CRM Emails](#)
- [Email Link Authentication](#)
- [One-Click Workflows](#)
- [Add-on Donations for Next Generation Events](#)
- [Specifying Attendees on Tickets for an Event](#)