November 2015 – Release Notes

As part of our commitment to continuously update and enhance our Fundraising system, we have recently made the following enhancements to the Frontstream fundraising professional platform.

HEPData Integration

We are excited to announce that the Frontstream Fundraising Pro platform is now integrated with HEPData's matching gifts database. Many employers sponsor matching gift programs and will match charitable donations made by their employees.

Available at no additional cost to Canadian and US Fundraising Pro clients, the HEPData integration allows donors on the Fundraising Pro platform to easily check if their employer offers matching gifts.

Enable/Disable HEPData Integration

Enabling HEPData for your organization is simple, just follow the steps outlined below.

1. From the administrator console, click on the **Configuration** tab.
2. Click on **HEPData**.
3. Click on **Enable** and then click **Save**.

Note: HEPData integration is only available for clients in Canada and USA.

Donation Pages

Once you have enabled HEPData, a "Matching Gift" area will be visible on the donation pages for all your events as shown in the image below.

The donor can then search for their employer by typing their employer name into the search box and clicking search. If the employer is found, the donor can then click on the employer name to see detail instructions about the matching gift eligibility and the process that the need to follow in order for the charity to receive the matching gift.

It is important to note that the HEPData integration is a means for providing donors with information about their employers matching gift eligibility. The Fundraising Pro Application does not collect the matched gift.

Matching Gift

Your employer may match your gift. Enter your employer name below to see if your company offers matching gift.

[dell] [Search]

Yes, **dell** is match eligible. 4 matching gift company(ies) were returned under that name in the Gift Plus matching gift database.

- Dell, Inc.

> **Company:** Dell, Inc.
> **Subsidiary Of:**
> **Foundation #:** 12620000
> **Last Updated:** 06/15/2015
> **Contact:** c/o Your Cause, LLC
> **Phone:** 8667516031
> **E-mail:** Dell-support@yourcause.com
> **Matching Gift Form URL:**
> **Matching Gift Guidelines URL:** http://content.dell.com/us/en/corp/d/corp-comm/make-a-difference.aspx
> **Minimum Amount Matched:** 25.0
> **Maximum Amount Matched:** 10000.0
> **Total Per Employee:** 10000.0
> **Gift Ratio:** 1.0:1.0
>
> **Comments:** Dell will only match donations that are made through their Giving community (www.dell.yourcause.com). They will not match 'offline' donations that are made directly to an organization. There are no forms available for matching as it is all done through the Giving community through their Intranet. They have also discontinued all matching to religious organizations.
>
> **Procedure:**
> - Participating donor logs into the matching gift website (check availability of log-in above) and submits the match request.

If this is your employer, click on the button below

[My Employer]

Once the donor has found their employer they can confirm their selection (optional) by clicking on the **My Employer** button.

Note: The Matching Gift section is only available in English. If the language preference for the page is French, a matching gifts section will not be visible.

Customizing the Donation Pages

If you wish to add your own instructions for donors to follow within the Matching Gifts section;

1. From the administrator console, click on the **Events** tab.
2. Search for the event that you would like to edit. Once you have found the event click on it.
3. Click on the **Content** option from the left navigation menu.
4. Go to the Donate page and in the editor you can either edit the existing instructions or add content below the search box as shown in the image below.
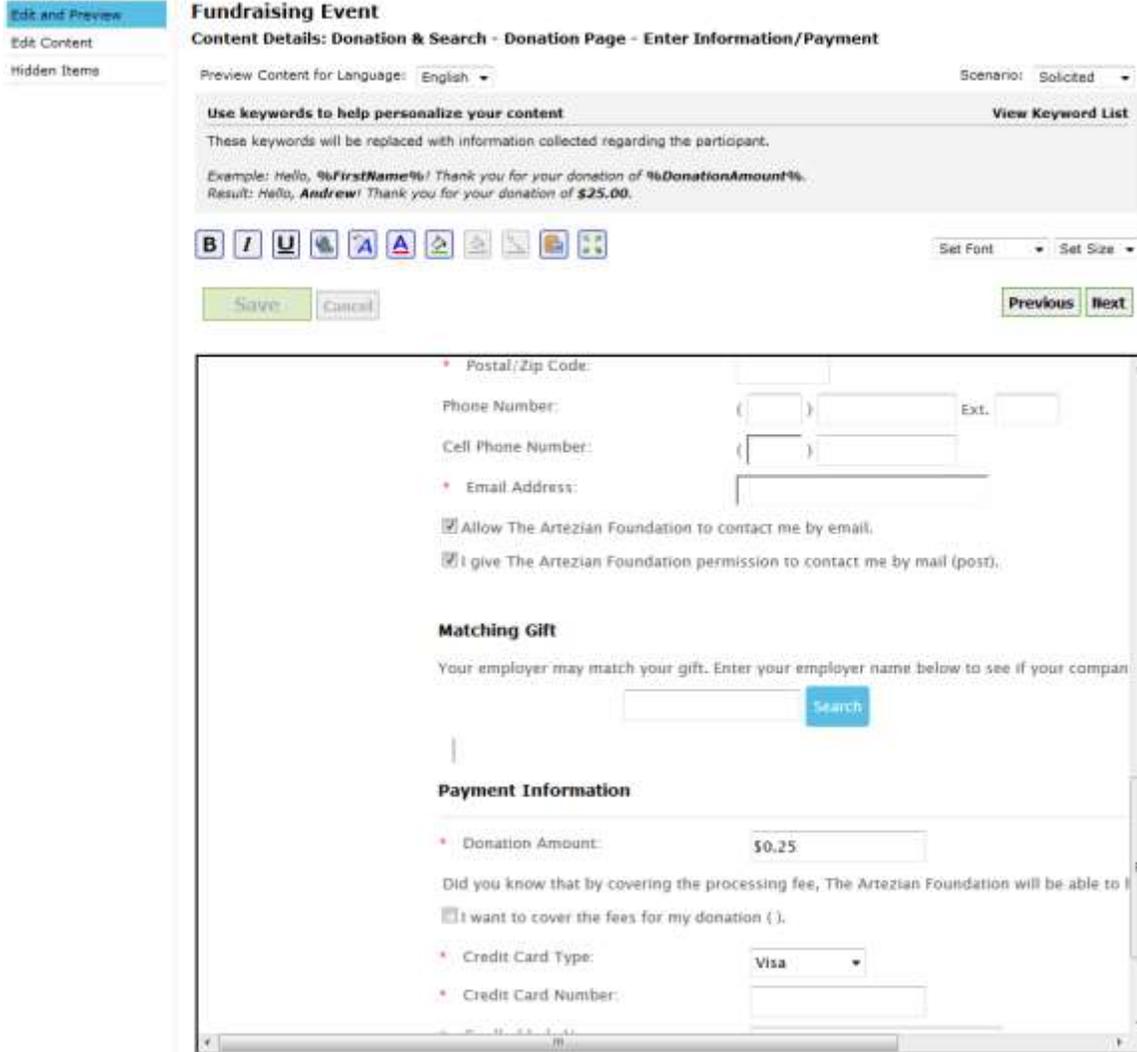
5. Click **Save** once you have made all your changes.

Update to Snapshot and Donation Details Report

We have updated the Snapshot and Donation Details report.

Snapshot Report

- The following column has been added to the Snapshot Report
    - **Matching Gift Employer Name** - For transaction type "Donation" a value is populated if the donor selects their employer from the search results.

Registration Detail Report

- The following column has been added to the Donation Details report as an available column.
    - **Matching Gift Employer Name** - A value is populated if the donor selects their employer from the search results.