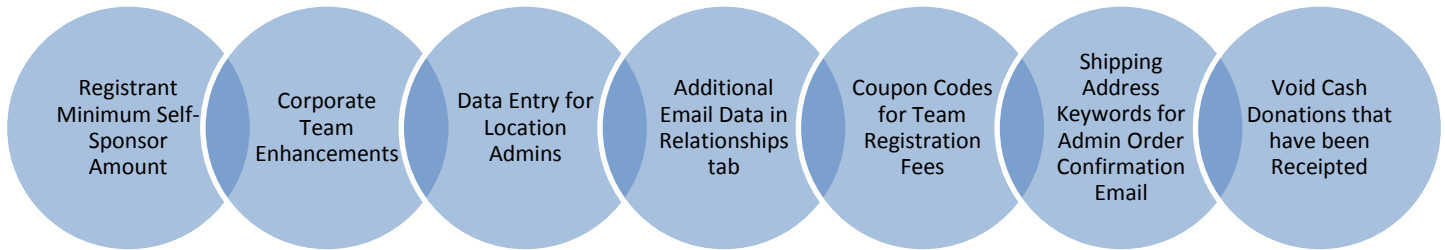# November 2014 – Release Notes

As part of our commitment to continuously updating and enhancing our products, we have recently made the following enhancements to the enterprise fundraising platform.

Registrant Minimum Self-Sponsor Amount	Corporate Team Enhancements	Data Entry for Location Admins	Additional Email Data in Relationships tab	Coupon Codes for Team Registration Fees	Shipping Address Keywords for Admin Order Confirmation Email	Void Cash Donations that have been Receipted

Registrant Minimum Self-Sponsor

In the "event/campaign" template, administrators now have the ability to enforce a minimum donation during registration.

Adding a Minimum Self-Sponsor Amount to a Registration

1. Go to **Event Settings** and ensure that **Enable self-sponsor: during registration** is checked.
2. From the administration console, go to the **Events** tab and search for your event.
3. Click on **Registrations**.
4. From the Registrations page, click on the registration type that you would like to add the minimum self-sponsor amount to.
5. Once you have selected the registration type, from the left navigation menu, click on **Business Rules**.
6. Click on the **Require Self-Sponsorship** to register and then enter a value in the **Self-Sponsor Amount** field.

Business Rules

☑ Require Self-Sponsorship to register   20   **Self-Sponsor Amount**
Not applicable to proxy registrants.

☐ Charge a fee to register   _____   **Registration Fee Amount**
☐ Waive Fee by raising   _____   **Funds Raised**

The registrant's status will change automatically from pending to registered once the amount specified has been raised by the registrant.

The registrant can pay this amount to become registered for the event. If there is also a waive amount, they have the option of not paying this amount.

7. When finished, click **Submit**.

When a participant goes through the registration process, a new Donation column will be visible in the registration type table informing the user that a donation is required. The column heading is editable through Content > Enhanced Registration > Registration Type Form.

On the Additional Information page, the donation field will be prepopulated with the value set by the administrator. The registrant can edit the value and increase the amount, however, they will not be able to enter an amount that is lower than the value specified in the business rules.

Notes: Minimum self-sponsor amount will not be enforced for proxy registrants ("Register Others" feature). It is also not available for group registration types.
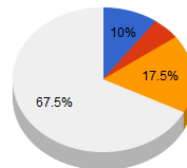
Corporate Team Enhancements

A few months ago, we introduced corporate teams. In this release, we have added the following enhancements to the corporate team functionality:

- Display the Corporate Team Captain on the Corporate Team Page
    - If a corporate team captain has been assigned to the corporate team, the captain will now be visible on the corporate team page.

- Display the corporate team affiliation on the personal and team pages
    - If an individual is affiliated with a corporate team, the team affiliation will be displayed on their personal page.

    - If the team is affiliated with a corporate team, the team affiliation will be displayed on the team page.

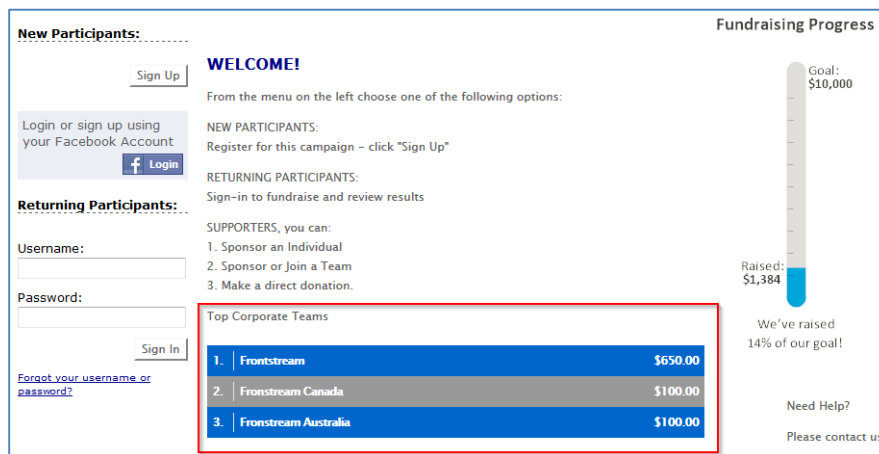- Display the corporate team affiliation in the Fundraising hub

- In addition to the enhancements listed above, we also display the corporate team affiliation in the Fundraising Hub. It is also easier to change the corporate team affiliation as seen in the screenshot below.

Personal Progress

Get Sponsors · Manage Sponsors · Visit Page

Total Amount Raised:	$200.00 ($0.00 Pledged)
Total Donations:	1 (0 Pledged)
Fundraising Goal:	100% of $100.00 (change)
Registration Status:	Registered
Online Registration Number:	133813
Corporate Team Affiliation:	Frontstream (change)

Personal Page:

https://secureqa2012a.artezhq.com/registrant/FundraisingPage.aspx?registration|

- Corporate Team Scoreboard
  - Admins can now enable a corporate team scoreboard that can be displayed in the event home page. To enable the corporate team scoreboard, follow the steps below:
    1. In the administration console, go to the event and click on **Widgets**.
    2. Under Scoreboard, click on **Manage**.
    3. Click on **Top Corporate Teams**.
    4. Pick and choose what you would like displayed on the scoreboard.
    5. When finished, click **Submit**.
    6. The scoreboard will be displayed on the event home page.

New Participants:

Sign Up

Login or sign up using your Facebook Account

f Login

Returning Participants:

Username:

Password:

Sign In

Forgot your username or password?

WELCOME!

From the menu on the left choose one of the following options:

NEW PARTICIPANTS:
Register for this campaign – click "Sign Up"

RETURNING PARTICIPANTS:
Sign–in to fundraise and review results

SUPPORTERS, you can:
1. Sponsor an Individual
2. Sponsor or Join a Team
3. Make a direct donation.

Top Corporate Teams

1.	Frontstream	$650.00
2.	Frontstream Canada	$100.00
3.	Frontstream Australia	$100.00

Fundraising Progress

Goal:
$10,000

Raised:
$1,384
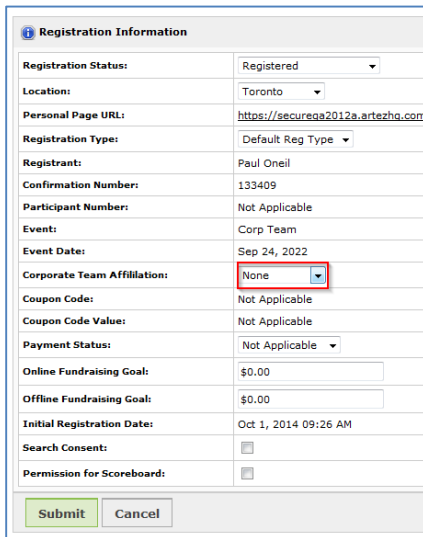
We've raised 14% of our goal!

Need Help?
Please contact us.

- Alternatively, you can use the corporate team scoreboard code under Important Links to embed the scoreboard widget on an external website. You could also call the data to build a corporate team scoreboard through a web service. For more information on web services, please contact support.

- Affiliate an individual or a team to a corporate team via the Relationships tab.
    1. To affiliate an individual to a corporate team, from the Relationships tab, search for the registrant.
    2. Once you have found the registrant, go to registrant event summary page.
    3. Under the **Registration Information** section, click on the ⊕ icon to expand the section.
    4. Next to Corporate Team Affiliation, click on the drop down and select a corporate team. If the drop down is not visible, it's because the person is part of a team. A "Change" link will be visible instead. When you click on the link it will take you to the Team Summary page where you will be able to set the Corporate Team affiliation for the team.

    5. Click **Submit**.

- New %CorporateTeamPage% keyword for registration confirmation emails.
    - The %CorporateTeamPage% populates the URL of the corporate team page when an individual is affiliated with a corporate team.

Data Entry for Location Admins

If you have administrators that only have access to specific locations in the event, you can now grant them access to the Data Entry tab. As a "location restricted" admin, they will be able to do the following in Data Entry:

- Create batches for the location(s) under which they have access
- Add a participant(s) to the location(s) under which they have access
- Add unsolicited donations

Note: Admins will not be able to view batches for events/locations if they have not been granted access.

Additional Email Data in the Relationships Tab

We have updated the Received Emails and Sent Emails sections in the Relationships tab for organizations with the email dashboard enabled. Email deliverability data will now be displayed on the constituent summary page.

A new "Status" column has been added. The Status column will display one of the following values:

- Delivered – Email was delivered but has not been opened
- Opened – Email was delivered and opened
- Clicked – Email was delivered, opened and a link within the email was clicked
- Bounced – Email was not delivered
- Pending – Email has not been sent by the system
- Processing – Email is in the processes of being sent
- Sent – Email has been sent, but we currently don't have data on the deliverability (i.e. delivered, opened, etc...)
- Failed – The system failed to generate the email

We have also added the ability to view data older than 30 days. You can use the date filter to choose a date range. It is important to note that the "View >" link is only visible for emails that are 30 days or less old.

The description column has also been updated and replaced with Email Type. Below is a list of all the possible email types:

Email Types	
Donation E-Card	Registration Confirmation - Data Entry
Email Team	Registration Confirmation - Express Register
eTicket	Registration Confirmation - Imported
Facebook Friendship Powered Fundraising App Not Enabled	Registration Confirmation - Online
First Fundraising Goal Reached Notification	Registration Confirmation - Registered By Another
Forget Password	Reminder to Fundraise Online
Forget Username	Request Pledge Sheet
Fundraising Goal Reached Notification	Request Results Form
Get Sponsors	Second Fundraising Goal Reached Notification
Mobile App Downloaded and Logged In	Send Invitations
Monthly Tax Receipt - Correction	Tax Receipt - Corporate Team Donation
Monthly Tax Receipt – Duplicate	Tax Receipt - Correction
Monthly Tax Receipt - Solicited Donation	Tax Receipt - Duplicate
Monthly Tax Receipt - Team Donation	Tax Receipt - Solicited Donation
Monthly Tax Receipt - Unsolicited Donation	Tax Receipt - Team Donation
New Message Board Post	Tax Receipt - Unsolicited Donation
New Sponsor Notification	Tell-A-Friend
New Team Member	Thank Sponsors
New Team Message Board Post	Thank Sponsors with E-Card
New Team Sponsor	Thank Team Sponsors
No Donations Received	Thank You - Corporate Team Donation
No Solicitations Sent	Thank You - In Honour of Donation
No Team Members	Thank You - In Memory of Donation
Notification - RSVP Response	Thank You - Monthly Solicited Donation
Purchase Confirmation	Thank You - Monthly Team Donation

Purchase E-Card	Thank You - Monthly Unsolicited Donation
Recruit Team Members	Thank You - Solicited Donation
Refer a Friend	Thank You - Team Donation
Registrant has not signed into the Mobile App	Thank You - Unsolicited Donation
Registrant has not signed into their Personal Fundraising Page	Third Fundraising Goal Reached Notification

Received Emails

Date Filter: Sep 7, 2014 - Oct 7, 2014

Submit Date	Event Name	Email Type	Status	
Sep 8, 2014	Omar's Test Event	New Team Member	opened	View >
Sep 15, 2014	Omar's Coupon Code Test Event	Registration Confirmation - Online	opened	View >
Sep 15, 2014	Omar's Coupon Code Test Event	Reminder to Fundraise Online	opened	View >
Sep 24, 2014	Omar's Test Event	New Team Member	opened	View >

Sent Emails

Date Filter: Sep 7, 2014 - Oct 7, 2014

Submit Date	Event Name	Email Type	Status	
Oct 6, 2014	Omar's Coupon Code Test Event	Get Sponsors	opened	View >
Oct 7, 2014	Omar's Test Event	Get Sponsors	sent	View >

Coupon Codes for Team Registrations

Coupon codes can now be configured for Group Registration types.

Shipping Address Keywords for Admin Order Confirmation Email

The following keywords are now available to use in the "Admin Notification - Order Confirmation" email for the Event/Campaign and Purchase templates:

- %ShippingAddressName%
- %ShippingAddressLine1%
- %ShippingAddressLine2%
- %ShippingAddressLine3%
- %ShippingAddressLine4%
- %ShippingCity%
- %ShippingProvinceCode%
- %ShippingPostalCode%
- %ShippingCountryCode%

Void Cash Donations that have been receipted

Administrators can now void a verified cash donation where a tax receipt was issued. Previously, these donations could only be altered to "unverified".