



Product Preview:

A sneak preview of Convio 5.3.60

June 26, 2008

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Product Development Themes

- Convio has prioritized future product development to support the following five themes:



Usability and Performance



Constituent Empowerment



The Best of GetActive



Convio Open Initiative



Best Practices Built-in

Overview of Convio 5.3.60 (Matterhorn)

- What is it?
 - ▶ A major release with enhancements to popular applications like Fundraising, Advocacy, Calendar Events, TeamRaiser, and eCommerce. It also includes important usability improvements for importing constituent data and selecting Page Wrappers.
- When does it go live to clients?
 - ▶ July/August
- How do I find out more?
 - ▶ Check out the Feature Summary Highlights at the Customer Center.



East Face of Matterhorn in the Swiss Alps

Matterhorn Release Contents

Topics We'll Cover Today

Visual Refresh for Administrative UI

Constituent Import

Donations

Events

eCommerce

Advocacy

TeamRaiser

Page Wrappers



Visual Refresh of Admin UI



Visual Refresh of the Admin UI

■ What changed?

- ▶ Redesigned 2 areas of the visual presentation layer
 - Admin Header
 - Process Navigator buttons
- ▶ Preserves the current users' workflow

■ Why is it important?

- ▶ Clearer, more pleasant user interface

■ What does it cost?

- ▶ No additional fee

■ Who is it available to?

- ▶ All clients

Visual Refresh of the Admin UI Header

Matterhorn Test Site Hello, System Administrator **CONVIO ADMIN on bvt103** | [Help](#) | [Log Out](#)

CONVIO Spam Complaints: unknown

[Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Email

[Email Home](#) [Email Calendar](#) [Campaigns](#) [Reports](#)

Email Home

Related Actions

- ▶ Create a new campaign

Draft Messages

The messages listed below are currently being worked on. Click the edit link to continue working on the selected message.

Approved Messages

The messages listed below have been approved and are ready to send but have not yet been scheduled for delivery. Click the send link to send the message now or schedule a future delivery.

Cross Campaign Summary

This report reflects totals or averages across all messages for all campaigns. These statistics are recalculated daily.

Number of Messages Sent:	0
Total Number of Emails Sent:	0
Average Number of Recipients:	0
Average Open Rate:	0.0%
Average Clickthrough Rate:	0.0%
Average Action Rate:	0.0%
Average Number of Forwarded Messages:	0
Average Number of Tell-A-Friends Sent:	0

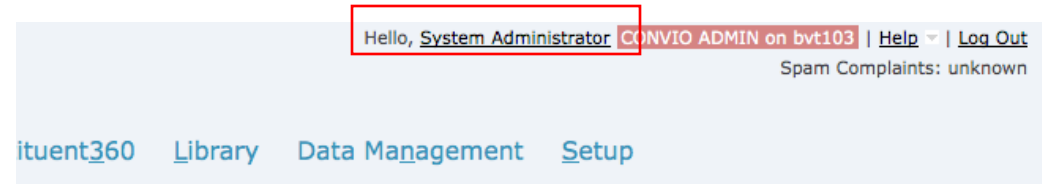
Email Trend

This report reflects average performance across all campaigns for each of the last 3 months. These statistics are recalculated daily.

Legend: ■ Open Rate ■ Action Rate ■ Clickthrough Rate

© PopChart.com

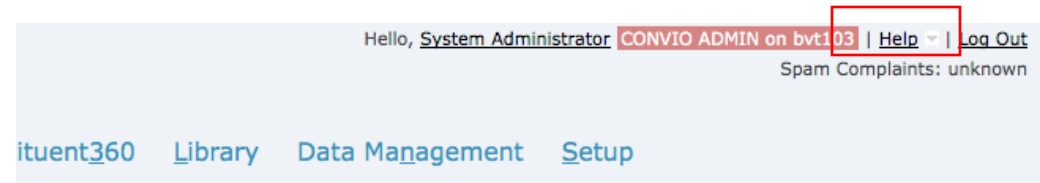
Visual Refresh of the Admin UI Header



Changes in Functionality

- Preferences

Visual Refresh of the Admin UI Header



Changes in Functionality

- Preferences
- Help menu now includes:
 - Context-Sensitive Help
 - Help Table of Contents
 - Convio Community
 - Convio Customer Center
 - File a Support Ticket

Visual Refresh of the Admin UI Header: New Menus

- New look to the menus
- Nothing's functionally changed

The screenshot displays the Convio Admin UI header for the 'Matterhorn Test Site'. The top navigation bar includes the Convio logo, the site name, and user information: 'Hello, System Administrator CONVIO ADMIN on bvt103 | Help | Log Out'. Below this, a secondary navigation bar lists menu items: Content, Fundraising (highlighted), Advocacy, Email, Constituent360, Library, Data Management, and Setup. The 'Email' menu is expanded, showing sub-items: TeamRaiser, Donation Management, Transactions, eCommerce, Discounts, Tributes, Auctions, and Service Center. The main content area is divided into several sections: 'Email Home', 'Related Actions', 'Approved Messages', and 'Cross Campaign Summary'. The 'Cross Campaign Summary' section contains a table of statistics.


Cross Campaign Summary	
This report reflects totals or averages across all messages for all campaigns. These statistics are recalculated daily.	
Number of Messages Sent:	0
Total Number of Emails Sent:	0
Average Number of Recipients:	0
Average Open Rate:	0.0%
Average Clickthrough Rate:	0.0%
Average Action Rate:	0.0%
Average Number of Forwarded Messages:	0
Average Number of Tell-A-Friends Sent:	0

Visual Refresh: Process Navigator Buttons

- Button & Link consistency throughout the product
 - Placement
 - Visual design
- Clearly call out the Primary and Secondary actions

Visual Refresh: Process Navigator Buttons

Matterhorn Test Site Hello, [System Administrator](#) **CONVIO ADMIN on bvt103** | [Help](#) | [Log Out](#)
Spam Complaints: unknown

 [Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Donation Management

[Online Giving](#) [Donation Classic](#) [Pending Contributions](#) [Sustaining Gifts](#) [Designated Giving](#) [Membership Types](#) [Donation Reports](#) [General Configurations](#)

Campaigns

[Create a New Campaign](#) [Upload Many Campaigns](#)

This is a list of Donation Campaigns that have been configured for your site. Use the Edit action to change information related to an overall campaign, such as the merchant account or the campaign goal. Use the Manage action to access the list of donation forms that have been configured for a campaign or to create a new form. To set up a new campaign, use the Create a New Campaign link or Copy an existing campaign.

[- Campaigns -](#) [- All Donation Forms -](#)

All My Categories


Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Search Show All Page 1 of 1

Name	Actions	Status	Category	Type	Summary
camp01 Campaign ID: 1001	Manage Edit	Active	General		Created: 06/09/2008 5:30 AM by convio Last Modified: 06/09/2008 5:30 AM by convio

Visual Refresh: Process Navigator Buttons

Matterhorn Test Site Hello, System Administrator **CONVIO ADMIN on bvt103** | [Help](#) | [Log Out](#)
Spam Complaints: unknown

 [Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Email


[Email Home](#) [Email Calendar](#) **Campaigns** [Reports](#)

[Campaigns](#) > Create a new campaign

Process Navigator	
1. Name and Description	<p>* 1. Enter a name for this Email Campaign The Email Campaign name is used internally. It will only be seen by you and other administrators. Your constituents will not see this. <input type="text" value="May Newsletter"/></p> <p>2. Enter a description for this Email Campaign The Email Campaign description is used internally for further identification. Your constituents will not see this. <input type="text" value="This is our May Newsletter Monthly to all Alumni"/></p> <p>3. Email Campaign Type Setting the email campaign type allows for comparison between similar email campaigns. <input type="text" value="Newsletter"/></p> <p>4. Select security category The campaign security category controls who in your organization has permission to create and send messages as well as report on results. <input type="text" value="General"/></p>
2. Interest Opt-In / Opt-Out	
3. Setup Optional Features for this Campaign	

Visual Refresh: Process Navigator Buttons

Matterhorn Test Site Hello, System Administrator **CONVIO ADMIN on bvt103** | [Help](#) | [Log Out](#)
Spam Complaints: unknown

 [Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Email

[Email Home](#) [Email Calendar](#) **Campaigns** [Reports](#)

[Campaigns](#) > Create a new campaign

Process Navigator

- 1. **Name and Description**
- 2. Interest Opt-In / Opt-Out
- 3. Setup Optional Features for this Campaign

1. **Enter a name for this Email Campaign**
The Email Campaign name is used internally. It will only be seen by you and other administrators. Your constituents will not see this.

2. **Enter a description for this Email Campaign**
The Email Campaign description is used internally for further identification. Your constituents will not see this.

3. **Email Campaign Type**
Setting the email campaign type allows for comparison between similar email campaigns.

4. **Select security category**
The campaign security category controls who in your organization has permission to create and send messages as well as report on results.

Primary action is called out: [Next] button

Visual Refresh: Process Navigator Buttons

Matterhorn Test Site Hello, System Administrator CONVIO ADMIN on bvt103 | Help | Log Out Spam Complaints: unknown

CONVIO®

Content Fundraising Advocacy Email Constituent360 Library Data Management Setup

Email

Email Home Email Calendar Campaigns Reports

Campaigns > Create a new campaign

Process Navigator

1. Name and Description
2. Interest Opt-In / Opt-Out
3. Setup Optional Features for this Campaign

1. Enter a name for this Email Campaign

The Email Campaign name is used internally. It will only be seen by you and other administrators. Your constituents will not see this name.

Primary action is called out: [Next] button

[Previous] button has been removed, but you can still move between steps in the process navigator

2. Enter a description for this Email Campaign

The Email Campaign description is used internally for reports and analysis. Your constituents will not see this description.

3. Email Campaign Type

Setting the email campaign type allows for comparison between similar email campaigns.

Newsletter

4. Select security category

The campaign security category controls who in your organization has permission to create and send messages as well as report on results.

General

Next Save Cancel



Constituent Import



Constituent Import

- **What changed?**
 - ▶ Introducing new point-and-click interface for configuring custom constituent data processes.
- **Why is it important?**
 - ▶ Provides easier and more flexible toolkit for adding constituent data from one or many sources without requiring help from the Convio services team.
- **What does it cost?**
 - ▶ No additional fee
- **Who is it available to?**
 - ▶ All clients
- **What about existing constituent upload features?**
 - ▶ Constituent Upload, Group Upload, Segmentation Upload processes to be retired first half of 2009

Managing Constituent Import Processes

Import/Export

- Data Sync Operations**
- Cross-Reference Types
- Resolve New Registrations
- DataSync WebServices

Data Sync Operations

[Create Self-Serve Import](#) ← Create new processes as needed

This list shows data sync operations that have been customized for your site. Click the Run action to configure and run a data sync operation. Data sync operations usually require that you upload or download one or more data files to complete the process. To view the results for all of the operations that you have run, click the Operation Results tab.

Operation & Description	Actions	Status	Last Activity
Constituent Profile Upload	Run Edit Copy Delete Last Result	Idle	Jun 2, 2008 12:39:03 PM by Site Administrator
Sam Sync One	Run Edit Copy Delete Last Result	Idle	Jun 2, 2008 10:15:14 PM by Site Administrator

← Configurations can be saved and re-used

Basic Options

Import/Export

Data Sync Operations | Cross-Reference Types | Resolve New Registrations | DataSync WebServices

[Data Sync Operations](#) > Edit

Process Navigator

- 1. Edit Self-Serve Import
- 2. Map Fields
- 3. Select Update Action
- 4. Import Data

Before you can import data, you need to create a data file with a row of column names and appropriate data in rows under those column names. The file must be comma or tab delimited. If you intend to schedule a recurring data import, you need to contact your account manager if you do not already have a Convio FTP server account. Before creating a scheduled self-serve import, you must upload a file with the row of column names. For details, refer to the [Self-Serve Import Help documentation](#).

*** 1. Data Sync Name:** ← Provide specific name and description
Identifies the Data Sync and is displayed in the various Operations lists.

2. Description:
Displays in the Operations list.

3. One-time or Scheduled: ← Can run manually or on scheduled basis
Specifies the type of import as one-time or scheduled (recurring).
 One-Time
Select the file to upload.

Scheduled

*** 4. File Delimiters:** ← Supports tab and comma delimited file formats
Specifies the delimiter used to separate data columns in the import file.
 Comma Delimited
 Tab Delimited

Mapping Import Files

Data Sync Operations
Cross-Reference Types
Resolve New Registrations
DataSync WebServices

[Data Sync Operations](#) > Map Fields

Process Navigator

1. Edit Self-Serve Import
2. **Map Fields**
3. Center Selection
4. Select Update Action
5. Import Data

*** 1. Date Format:**

Specifies the format of all dates in your import file. Dates may have hyphens (-), slashes (/), periods (.), or spaces (for example, 4-17-2000, 4/17/2000, 4.17.2000, 4 17 2000). Months may be specified as either a number (1-12) or 3-letter abbreviation (for example, Apr 17 2000).

- U.S. date format (Month Day Year)**
- European date format (Day Month Year)**
- ISO date format (Year Month Day)**

*** 2. Data Fields:**

Matches headers in the import file with corresponding fields in the Constituent360 database.

File Header	Convio Field	More Information
MAILING_CITY	Address: City	
LAST_NAME	Name: Last Name	
DO_NOT_EMAIL	Accept Email	<input type="checkbox"/> Flip Value (Yes means No)
MAILING_POSTAL_CODE	Address: ZIP/Postal Code	
MAILING_STATE	Address: State/Province	
FIRST_NAME	Name: First Name	
MAILING_STREET_1	Address: Street 1	
MIDDLE_INITIAL	Name: Middle Name	
EMAIL_ADDRESS	Email	
HOME_PHONE	Phone	

Intelligent boolean transformations

Next
Cancel

Setting Update Rules

Data Sync Operations > Select Update Action

Process Navigator

- Edit Self-Serve Import
- Map Fields
- Center Selection
- Select Update Action**
- Import Data

*** Data Decisions:**
Specifies how to update existing records in the Convio system.

Only add new constituents
 Overwrite blank fields with values from the import file [Hide Example](#)

Local File	Convio Before Import	Convio After Import
Example First Name	Example First Name	Example First Name
Example Middle Name		Example Middle Name
Example Last Name	Example Last Name	Example Last Name
example@email.com	convio@convio.com	convio@convio.com
1111	1111	1111
2222	3333	3333
1/1/2001	1/1/2001	1/1/2001
Yes		Yes

Overwrite all fields with values from the import file [Hide Example](#)

Local File	Convio Before Import	Convio After Import
Example First Name	Example First Name	Example First Name
Example Middle Name	Convio Middle Name	Example Middle Name

This option will skip all records in file that match a Convio record

Example of what the process will do to any matched records

- Note: Update rules can be edited at run-time

Uploading Group and Interest Assignments

Data Sync Operations
Cross-Reference Types
Resolve New Registrations
DataSync WebServices

[Data Sync Operations](#) > Map Fields

Process Navigator

1. Edit Self-Serve Import
2. **Map Fields**
3. Center Selection
4. Select Update Action
5. Import Data

*** 1. Date Format:**

Specifies the format of all dates in your import file. Dates may have hyphens (-), slashes (/), periods (.), or spaces (for example, 4-17-2000, 4/17/2000, 4.17.2000, 4 17 2000). Months may be specified as either a number (1-12) or 3-letter abbreviation (for example, Apr 17 2000).

U.S. date format (Month Day Year)
 European date format (Day Month Year)
 ISO date format (Year Month Day)

*** 2. Data Fields:**

Matches headers in the import file with corresponding fields in the Constituent360 database.

File Header	Convio Field	More Information
Member_ID	Member ID	
Group_ID	Group ID	The ID of a group to add the constituent to. Values can be Convio IDs or external IDs cross-referenced to Convio IDs. Groups that do not exist will not be created.
Email_Interest	Email Interest Name	The name of an email interest to add the constituent to. Values can match the name of an existing email or web interest. If the interest does not exist, an email interest will be created.
Web_Interest	Web Content Interest Name	The name of a web content interest to add the constituent to. Values can match the name of an existing email or web interest. If the interest does not exist, a web content interest will be created.

Next
Cancel



Donations



Donations: Offline Gift Processing/Recording

- **What changed?**
 - ▶ Ability to process/record offline gifts in Donation Campaign Forms
- **Why is it important?**
 - ▶ Improves support for multi-channel fundraising
- **What does it cost?**
 - ▶ No additional fee
- **Who is it available to?**
 - ▶ All Donation Campaigns clients

Donations: Offline Gift Processing/Recording

- Creating Donation Form:
 - ▶ Form option denotes online form, offline form, or both
 - ▶ Clients can choose offline gift payment methods
 - ▶ Clients can customize forms
 - ▶ CVV not required for offline gifts

- Entering an Offline Gift
 - ▶ Start from Transactions tab on Constituent page
 - ▶ Choose from available offline and online/offline forms
 - ▶ Select whether to send autoresponders to offline donors

Donations: Offline Gift Processing/Recording

Offline Donation Forms

Gift & Payment Information

Review Gift

* Enter A Gift Amount:

Billing Information

Title:

* First Name:

Middle Name:

* Last Name:

Suffix:

* Street 1:

Street 2:

* City:

* State/Province:

* ZIP/Postal Code:

Country:

* Email Address:

Payment Information

* Select a Payment Type:

Credit Card Type:

* Credit Card Number:

* Expiration Date:


Cancel

Next

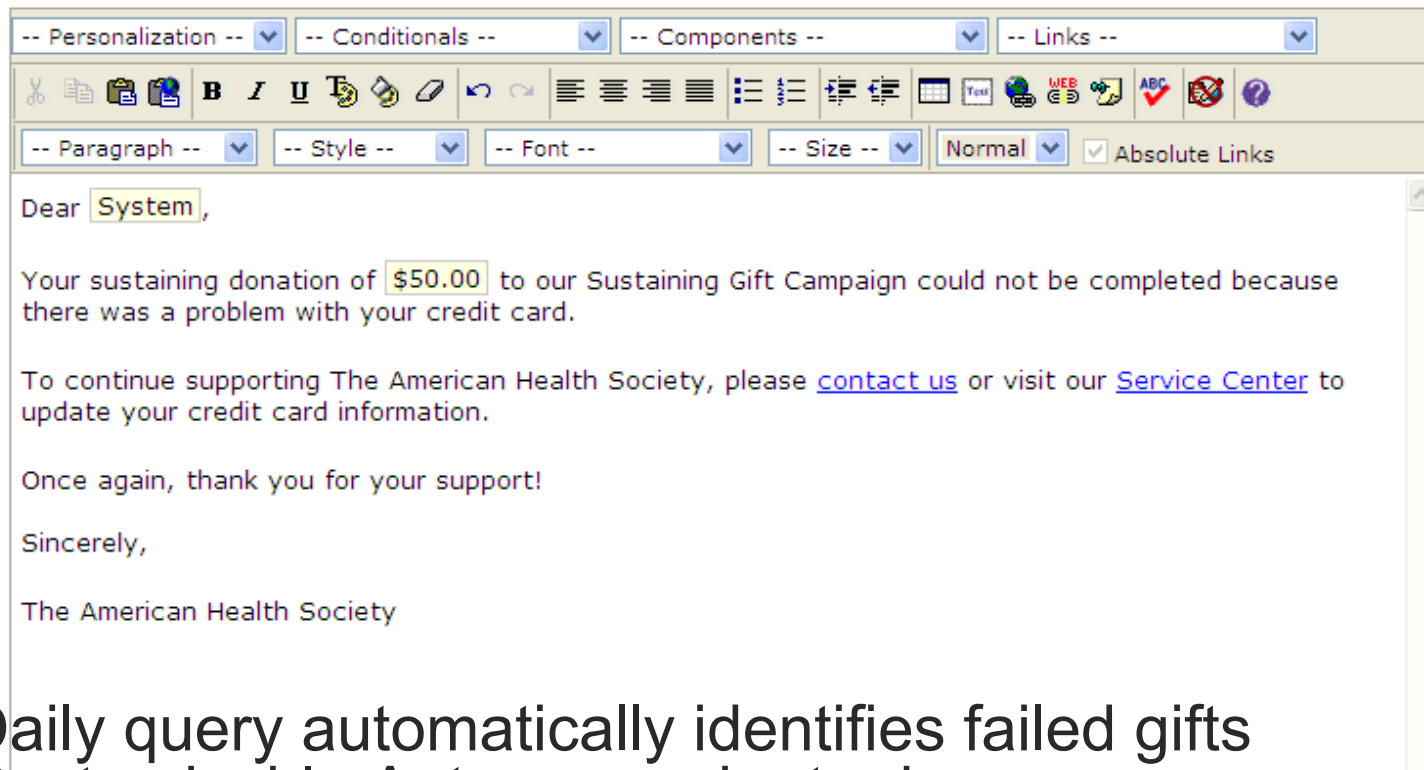
Donations: Failed Gift Notification

- **What changed?**
 - ▶ New autoresponder for failed sustaining gifts
- **Why is it important?**
 - ▶ Saves time: Client admins no longer need to manually query and e-mail donors when a sustaining gift fails
 - ▶ Increases revenue: Reduces likelihood of losing gifts from sustaining donors
- **What does it cost?**
 - ▶ No additional fee
- **Who is it available to?**
 - ▶ All Donation Campaigns clients

Donations: Failed Gift Notification

 * 1. Enter and format the content of your message in the HTML Editor below:

Before you type in or delete information, you should click the Preview button to see how this autoresponder will look as email. Remember button to remove any changes you have made since the last time you saved your work.



The screenshot shows an HTML editor interface with a toolbar and a text area. The toolbar includes options for Personalization, Conditionals, Components, and Links. Below the toolbar are sections for Paragraph, Style, Font, and Size, with a 'Normal' style selected and 'Absolute Links' checked. The text area contains the following message:

Dear **System**,

Your sustaining donation of **\$50.00** to our Sustaining Gift Campaign could not be completed because there was a problem with your credit card.

To continue supporting The American Health Society, please [contact us](#) or visit our [Service Center](#) to update your credit card information.

Once again, thank you for your support!

Sincerely,

The American Health Society

- Daily query automatically identifies failed gifts
- Customizable Autoresponder to donor
- Autoresponder links to Gift Service Center, so that donor can easily update their credit card information



Calendar Events



Events Enhancements

■ What changed?

- ▶ Calendar is being re-branded and will now be called Events (still under the Content menu)
- ▶ Offline Registration for events
- ▶ Additional attributes per event
- ▶ Configurable Calendar Component
 - Both admin-facing and constituent-facing enhancements

■ What does it cost?

- ▶ No additional fees


■ Who is it available to?

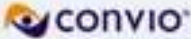
- ▶ All Calendar clients

Offline Registration

- Offline Registration will enable the organization to register constituents via offline processes, without having to access the user-side interface
- Organizations will benefit
 - ▶ More efficient registration capabilities
 - ▶ More channels to collect registrations
- Setup
 - ▶ No set up steps required to use this feature
- Limitations to note:
 - ▶ There is no bulk upload of registrations
 - ▶ There is no ability to manage unconfirmed payments

Add Event Attendee

Hello, [System Administrator](#) 



[Home](#) [Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Calendar Events

[Event Calendar](#) [Event List](#) **[Attendees](#)** [Reports](#)

[Attendees](#) > [Add EventAttendee](#)

Process Navigator

- 1. Select Attendee**
- 2. Set Event Information

1. Attendee Selection

Determines whether a new donor should be created, or an existing donor should be selected from Constituent search results.

Search for Existing Constituent

Create a New Attendee

Enter the attendee's personal information.
Enter at least the first and last name of the attendee. The contact information provided here creates a constituent record for the donor.


	Title	First Name	Middle Name	Last Name	Suffix
* Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address 1:	<input type="text"/>				
Address 2:	<input type="text"/>				
City:	<input type="text"/>				
State/Province:	<input type="text"/>				
Zip/Postal Code:	<input type="text"/>				
Country:	<input type="text"/>				
Email:	<input type="text"/>				
Phone Number:	<input type="text"/>				

[Create](#)

[Finish Later](#)

Payment Options

Hello, [System Administrator](#) [CONVIO Admin](#) | [Help](#) | [Spam Complaints](#)

 [Home](#) [Content](#) [Fundraising](#) [Advocacy](#) [Email](#) [Constituent360](#) [Library](#) [Data Management](#) [Setup](#)

Calendar Events

[Event Calendar](#) [Event List](#) **Attendees** [Reports](#)

[Attendees](#) > [Event Information](#)

Process Navigator

- 1. [Select Attendee](#)
- 2. [Set Event Information](#)**

1. Event Information:
This contains the information needed for the attendee to attend.

Name	Price	Quantity
LunchTicket	\$30.00	1

Total:

2. Reminder Days:
 Yes, email a reminder

3. Payment Method:
Determines the method by which the attendee paid. If the monetary value is equal to zero or none exists will be processed ignoring the selected payment method.

Cash
 Check
 Credit Card

Credit Card Information:
Identifies the credit card number and the month and year of its expiration date, and verifies the card if the Issue Number or CVV field displays (note that the payment will be processed immediately to this credit card)

* Credit Card Number:

* Expiration Date:

[Finish Later](#)

Additional Event Attributes

- Organizations can attach and/or capture additional data points for each event for later use with reporting or filtering. Examples are: accounting codes, affiliate codes, and event category
- Organizations will benefit
 - ▶ More options to simplify reporting
 - ▶ More event presentation flexibility
- Set-Up
 - ▶ No set up steps required to use this feature

Additional Event Attributes

Event Calendar | Event List

James Test 05/22/2008 > Configure Additional Information

Process Navigator

- 1. Identify Event
- 2. Configure Event Date
- 3. Configure Additional Information**
- 4. Customize Autoresponders
- 5. Publish

Related Actions

- Customize Tell A Friend
- Associate Interests
- Customize Related Links

- 1. Event Tag:**
Defines a tag that can be used to help search for this event.
- 2. Location:**
Identifies the location of the event.
- 3. Address Information:**
Address information describing where this event takes place
Street 1:
Street 2:
City:
State / Province:
ZIP / Postal Code:
Country:
- 4. Accounting Code:**
This field allows an accounting code to be assigned to the event for reporting purposes.
- 5. Category Type:**
Category type can be set to allow the event to be filtered
 Choose an existing value
 Enter a new value
- 6. Affiliate Type:**
Affiliate type can be set to allow the event to be filtered
 Choose an existing value
 Enter a new value

Use Event Attributes to Filters Report Data

Reports

Reports Classic Report Writer Report Results

Reports > james

This is the list of filters configured for this report. Use the links and actions on this page to create more filters or work with the existing ones

[Create a filter](#)

Filter	Edit at run-time	Actions
Event is any of the following cmatest1 James Test LynStandard_Open rsv child test	REQUIRED	Edit
State/Province Contains CO		Edit

[Next](#)

[Finish Later](#)

Process Navigator

1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
- 4. Configure Filters**
5. Identify Report
6. Report Criteria Summary

Related Actions

- Accessible Filters

Calendar Component

- Now allows the admin to pre-filter the events that can be seen on the component
- Admin also can select constituent-facing filters, and constituents can narrow down the events to display those they really care about
- Requires steps make new calendar component available (add event attributes to existing events and optionally replace existing calendar page)

Configurable Calendar Component

Matterhorn Test Site: PageBuilder - Windows Internet Explorer
https://bvt100-secure.convio.com/bvt101/admin/PageBuilderAdmin/815487288?popstep=1&pagebuilder=component_calendar&component_id Certificate Error

Calendar Static Filters

Select filters which will constrain which events will appear in your calendar.

Static Filters:	Event Name	<input type="text"/>	Add
	City	<input type="text"/>	Add
	State	All	Add
	Zip Code	<input type="text"/>	Add
	Interest	All	Add
	Category Type	All	Add
	Affiliate	All	Add
	Security Category	All	Add

Constituent Facing Filters

Select which filters you would like Constituents to be able to use. Note that if the keyword filter is selected, it will appear by itself. The remaining filters will then be available through a clickable link.

- Keyword
- Event Name
- City
- State
- Zip Code
- Zip Code Radius
- Activity Type
- Affiliate
- Interests

Cancel Apply

Done Internet 100%

Constituent-Facing Calendar with Filters

Filter Events By:

Event Name [Back to Keyword Filter...](#)

City

State

Zip Code Radius

Interest

Category

Affiliate

Go To Date:

◀ May 2008 ▶

Month	Week	Day	Month List	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	April 30	May 1	2	3				
4	5	6	7	8	9	10				
11	12	13	14	15	16	17				
18	19	20	21	22	23	24				
25	26	27	28	29	30	May 31				

= Open
 = RSVP
 = Ticketed
 = Denotes Recurring Event



eCommerce



eCommerce: Digital Downloads

- **What changed?**
 - ▶ Ability to upload a digital file for purchase as an eCommerce product
- **Why is it important?**
 - ▶ Expands opportunity for eCommerce revenue
- **What does it cost?**
 - ▶ No additional fee
- **Who is it available to?**
 - ▶ All eCommerce clients

eCommerce: Digital Downloads

■ Admin Features:

- ▶ Clients can upload files up to 10MBs
- ▶ Clients can link to files over 10MBs that are hosted on another server, and digitally sign the link to ensure security

■ User Features:

- ▶ Product will display as any other product in the store
- ▶ Link to download the product appears in the “Thank You” page and Autoresponder, as well as in the constituent’s interactions and reports

eCommerce: Digital Downloads

Dear Jane,

Thank you for your purchase.

Total Purchase Amount: \$10.00

Fair Market Value: \$0.00

Tax Deductible Value: \$10.00

Quantity	Item Name	Total Price
1	Eat to Beat Cancer PodCast (\$10.00 each)	\$10.00
Total Price of Items:		\$10.00

To retrieve your product (Eat to Beat Cancer PodCast), please click on the link below.

[Download Eat to Beat Cancer.wma](#)

For future reference, your tracking code is: 101-1003-25-1004-1005

We are deeply grateful for your generosity and support of our efforts. Your purchase makes a difference - it enables us to provide vital services to the community we serve. We count on you and people like you to ensure that we can continue providing these services.

[Print this page for your records](#)

A copy of this information will be emailed to jsmith@convio.com for your records.

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[Printer Friendly Version](#)

eCommerce: Layout Enhancements

■ What changed?

- ▶ Style Sheet & Page Layout options – option to choose colors and menu placement or to upload your own CSS file
- ▶ Featured Products – option highlight priority products at the top of the store page
- ▶ Category Pages – option to create a Category landing page and link to product types within that category

■ Why is it important?

- ▶ Flexibility for eCommerce interface should lead to additional product purchases

■ What does it cost?

- ▶ No additional fee

■ Who is it available to?

- ▶ All eCommerce clients

eCommerce: Featured Products

Categories

- Browse Store
- Health Research
- Healthy Living
- Mental Health
- Patient Care
- Smoking Cessation

Featured Products



Health and the Environment Presentation



Eat to Beat Cancer PodCast



Healthy Living PodCast

Featured product appear at the top of each catalog page



[More information...](#)

200 Healthy Recipes In 30 Minutes Or Less

Despite its title, Webb's newest cookbook is more than just a compilation of recipes: she delves into the whole process of organizing a kitchen, stocking a pantry, preparing weekly meal plans, and building shopping lists around those meal plans, including shopping monthly for staples.

\$14.95 Quantity:

Add to Cart



CPR Instructor Presentaion

AHS offers pre-recorded sessions to help you and your family prepare for emergencies.

\$20.00 Quantity:

Add to Cart

eCommerce: Product Upload Enhancements

- **What changed?**
 - ▶ New options in eCommerce product uploads: Product ID, Store ID, Multiple Category Assignments
- **Why is it important?**
 - ▶ Ensures easier product updates
 - ▶ Admins can accomplish more with uploads
- **What does it cost?**
 - ▶ No additional fee
- **Who is it available to?**
 - ▶ All eCommerce clients

eCommerce: Upload Enhancements

- Features:
 - ▶ Matches on Product ID
 - ▶ Assign Product to one or more Stores
 - ▶ Assign more than one Category
 - ▶ Short Description no longer required for updates



Advocacy Enhancements



Advocacy Enhancements

■ What are they?

- ▶ Survey integration with Action Alert form
- ▶ Tell-A-Friend UI enhancements
- ▶ Mapping Action Alerts to Congressional web form topics

■ Why are they important?

- ▶ Ability to collect valuable information from Advocacy participants
- ▶ Better ability to engage Advocacy participants on additional actions
- ▶ Improve deliverability of communications to Congress

■ What does it cost?

- ▶ No additional fees

■ Who is it available to?

- ▶ All Advocacy clients

Advocacy – Survey Integration

Action Alerts

[Action Alerts](#) > Include Questions

Process Navigator

1. Identify Alert
2. Advanced Options
3. Alert Message
4. Include Questions
5. Select Targets
6. Configure Autoresponder
7. Thank You Page Display Options
8. Configure Pages
9. Preview Alert

Add a Question

This is the list of Additional Questions that can be displayed on registration for this Event. The Include This Question checkbox for each question to be displayed on the registration form should contain a checkmark. Arrange the display order the questions using the Order column.

- Event Questions -

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Questions	Actions	Order	Question Type	Update Constituent	Required	Include this Question
Your Contact Information		<input style="width: 40px;" type="text" value="1"/>	Constituent Registration Info	Yes	Yes	<input checked="" type="checkbox"/>

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Advocacy – Survey Integration

Act Now to Protect the Ocean from Global Climate Change

1. Personalize the subject and text of the message on the right with your own words, if you wish.
2. Click the Send Your Message button to send your letter to these decision makers:

- Your Senators
- Your Representative

* = Required Fields

*1. Your Contact Information

* Title:

* First Name:

* Last Name:

* Email:

* Street 1:

Street 2:

* City:

State / Province:

ZIP / Postal Code:

* Phone Number:

*2. Please provide your mobile phone number.

*3. Want to get learn more about Coral Reefs?

 Coral Reefs

Next Step

Send This Message

Subject:

Dear *[Decision Maker]*,

Please personalize your message

As you consider legislation to address the impacts of global climate change and reduce the emissions of dangerous greenhouse gases, I urge you to make certain that such legislation reduces emissions substantially and includes a strong component for strengthening the resiliency of our ocean and its wildlife, and improving their ability to adapt to the effects of climate change.

I strongly support efforts to cap and reduce the emissions of global warming gases, and understand there are strong proposals to do that. But it is imperative that any legislation considers the effect on the ocean, as well.

As you know, the ocean drives the earth's climate and is essential to all life on the planet and it's one of the first casualties of increasing concentrations of greenhouse gases in our atmosphere. The warming and increased acidification of the ocean will have dire consequences for our planet, from catastrophic weather events and the destruction of valuable coastal communities as sea level rises, to the loss of fragile marine life and the depletion of

Sincerely,

System Administrator
[Your Address]
[City, State ZIP]

[Privacy Policy](#) | [Site Map](#) | [Contact Us](#) | [Home](#)

[Printer Friendly Version](#)

Tell-A-Friend UI Enhancement


 * 1. Configure Thank You Page Display Options

- Display the Thank You page without Tell-A-Friend
- Do not display the Thank You page. Redirect to this URL instead.
- Display the Thank You page with Tell-A-Friend
- Display the Thank You page with Tell-A-Friend then redirect to a URL

After Tell-a-Friend, redirect to URL:

 * **Instructions:**

Enter instructions that will be shown to constituents regarding the Tell-a-Friend message

 * **Message Subject:**

Enter the subject for the Tell-a-Friend message.

 * **Message Body:**

Enter the body text for the Tell-a-Friend message.

Mapping ActionAlerts to Congr. Web Form Topics

- Client selects a topic area for their communication from a Convio master list of topics
- Convio maps this selection with the closest match on individual legislator webforms
 - ▶ Note: Legislators have different issue categorizations
- Message is posted to webform with a specific topic
- Message is delivered to the appropriate contact within the office without requiring additional categorization.



TeamRaiser



TeamRaiser Enhancements

■ What changed?

- ▶ Several small enhancements to empower TeamRaiser Event Managers and Administrators as well as to foster competition among teams and participants

■ Why is it important?

- ▶ Improves TeamRaiser usability

■ What does it cost?

- ▶ No additional fee

■ Who is it available to?

- ▶ All TeamRaiser clients

TeamRaiser - General Enhancements

- Fundraising totals in Team Rosters
- Admin sets maximum Team size
- Support for Mailing Address
- New Admin Notifications
 - ▶ Someone started a new Team
 - ▶ Someone registered for a selected Participation Type

General TeamRaiser enhancements

■ Screenshots

TeamRaiser

TeamRaiser List | Cross-Event Teams | Registration Upsells | Event Management Settings | Uploads

[TeamRaiser List](#) > NoelTR

Process Navigator
1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Associate Upsells
6. Manage Participation Types
7. Manage Discounts
8. Manage Stationery
9. Manage Autoresponders
10. Customize Suggested Messages
11. Customize Pages
12. Customize Event URL

1. Honorary Teams:

Determines if participants will be randomly assigned to an Honorary Team (typically for a special phase of the event that is led by a celebrity and is not associated with the team the participants have joined)

Yes, assign each participant to an Honorary Team by random selection during registration

2. Team Formation:

Determines if a registering participant can form a team for this event and become the Team Captain

Note: This option must be enabled to use the other team options below.

Yes, allow a participant to form a team to register and then assign that participant as the Captain

3. Team Size:

Defines the maximum number of members allowed on a team

4. Password-Protected Teams:

Determines if a Team Captain can assign a password that others must know in order to join the team

Yes, allow Team Captains to assign passwords for admission to their teams

TeamRaiser – Event Manager Enhancements

- Additional WYSIWYG options in Event Manager Center
 - ▶ Personalization & Conditionals
 - ▶ Table Editing
 - ▶ HTML Editing
 - Event Manager schedules Coaching Email
 - Event Manager manages email groups
 - New Admin Permission: “Design”
- TeamRaiser

Event Manager Enhancements

■ Screenshots

Event Center | Event Web Site | **Event Emails** | Customer Service | Reports

Event Emails > Manage Email Groups > Manage NoeITR Donors

[Refresh this page](#)

- Group Membership -

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Search Show All Page 1 of 1 To Page

<input type="checkbox"/>	Name	Actions
<input type="checkbox"/>	sally schmoe nnail+sm@convio.com	Edit Remove
<input type="checkbox"/>	joe smith nnail+js@convio.com	Edit Remove

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

[Remove Checked](#)

Related Actions

- Add Member
- Upload More

No filters selected

Delivery Options

These delivery options have been selected:

No options selected

2. Send it!

Send this email message to all of the members of the audience you have configured who have not already received a copy. Members who have already received a given message are automatically excluded.

[Send Immediately](#)



Page Wrapper Enhancements




Page Wrapper Editor enhancements

- **What is it?**
 - ▶ Non-default active Wrappers can now be assigned to additional modules (following PageBuilder and Advocacy in prior release).
- **Why is it important?**
 - ▶ Greater flexibility and page-level control
 - ▶ Reduces proliferation of security categories
- **What does it cost?**
 - ▶ No additional fees
- **Who is it available to?**
 - ▶ All clients


Non-Default Wrapper Selection

- New Wrapper selector UI in:
 - ▶ Surveys
 - ▶ eCommerce
 - ▶ Calendar Events
 - ▶ Personal Events
- Which wrappers appear in menu?
 - ▶ All active wrappers for assigned security category, *plus*
 - ▶ All active wrappers for General security category

Screenshot: Survey

 * 1. **Survey Name:**
Identifies this survey to administrators browsing the Survey List and displays as the title of the survey to you constituents when it is displayed on a PageBuilder page

2. **User Security Category:**
Controls who can view and answer the questions in this survey

 * 3. **Page Wrapper:**
Select your desired Page Wrapper. Page Wrappers are managed from Page Wrapper Editor in Setup.
 Use the default Page Wrapper
 Override the default Page Wrapper
*The default wrapper is **RegUsrDef** (Category: **Registered users only**).*

4. **Registered users only** : answers submitted to the questions in this survey

Please Select
Copy of RegUsrNonDef2
RegUsrDef
RegUsrNonDef1

5. **General**
GenDef
GenNonDef1
GenNonDef2 : Informational text above the survey questions if this is a stand-alone survey (note that it will not display if the survey is embedded in pages or emails)



Q & A

Submit questions by typing them into the question text box and then hitting the “Ask” button.





Thank you!

You can access these slides in our online Community at:
<http://community.customer.convio.com/community/Webinars>

The recording of this session will be posted within 7-10 business days.

And register for our next Client Best Practices Webinar:

Optimizing Your Web site 101.2:

Motivating your supporters to take initial actions

