Common Ground Fall '09 Release Preview

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Agenda

- Common Ground v2.1 New Features
  - Relationship Enhancements
  - Grant Management
  - Address Standardization
  - Fund Accounting Integration Enablement

- Upgrade Process

- Questions & Answers

Relationship Enhancements

- From right within the Relationship Widget:
  - See the total numbers of related accounts and contacts
  - Select specific relationships as Key, and prioritize them at the top of the list
  - Group related contacts and accounts by relationship type, with counts
  - Track a Primary Contact for an organization
  - View contacts that are directly associated with an organization
  - View contacts that were once directly associated with an organization, but have since been converted to household contacts with a connection to the organization
  - Choose from a dropdown of available relationship types when adding a new relationship

Relationship Enhancements

…and now the demo

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Grant Management

- Capture pertinent information about organizations that make grants

- Track the steps and tasks involved in your process for applying for and reporting on grant funding

- Automatically record key dates based on stage changes

- Report on grants you are tracking by stage, or view grant-related tasks and deliverables

Grant Management

…and now the demo

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Address Standardization

- Ensure that certain or all of your contact and account addresses meet CASS™ (Coding Accuracy Support System) specifications to qualify for USPS's accuracy-based postal discounts

- Click a button to standardize a single address immediately, comparing original and standardized version side-by-side with the option to set manually

- Run a utility to standardize addresses in bulk

- Track address standardization status on contacts and accounts

Address Standardization

…and now the demo

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Fund Accounting Integration Enablement

- Track post and reversal status with audit trails

- Prevent editing of posted gifts and pledges and their designations

- Set granular GL codes to account for gift, transaction, and record types

- Record reversed values and designations as distinct from newly reposted values and designations

- Run a utility to export reports of pending donations and pledges and update to posted
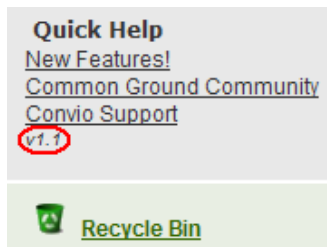
Fund Accounting Integration Enablement

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Upgrade Process

- Common Ground v2.1 is currently on target to be available toward the end of October 2009

- Your organization's instance of Common Ground must be on v2.0 to be eligible for upgrade to v2.1

- To see your current version:
  - Quick Help (just below Recent Items on left panel)

    Quick Help
    New Features!
    Common Ground Community
    Convio Support
    v1.1

    🗑 Recycle Bin

  - Setup → View Installed Packages

    Installed Packages

Action	Package Name	Namespace	Version Name	Publisher
Uninstall ⬇	Common Ground	cv	1.1.18	Convio
	Description Convio Common Ground constituent relationship management system.			

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Upgrade Process

- All registered Common Ground users and implementation partners will receive an email notification upon availability, directing to detailed upgrade instructions and release notes

- Assign a <u>single user</u> *(either within your organization or your implementation partner)* <u>with System Administrator profile</u> to:
  - Follow the link in the email to the instructions
  - Read the instructions thoroughly
  - Carry out the upgrade process as directed
  - Open a support case with any issues or questions

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Questions & Answers

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Thank You!

For more information on Common Ground v2.1, please see the

Common Ground Fall '09 Release

post in the Common Ground Online Community.