Cloud Engage
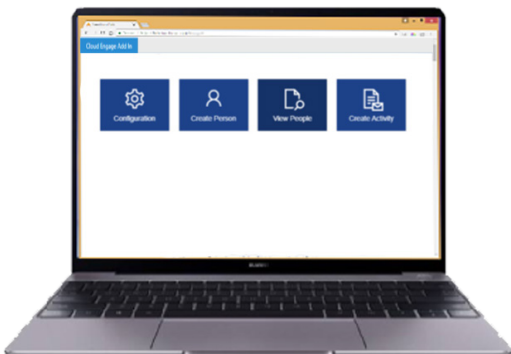
The release of Cloud Engage 20.2 includes new functions that help you maximise every fundraising opportunity

Don't miss out on critical information

Cloud Engage holds all key information about your members and donors including memberships, financial transactions, interests, event attendance, opportunity and case data. Everything needed to maximise audience engagement is at your fingertips.

Outlook add-in is a smarter way of working

One vital source of information is the daily interaction that happens via email, and for ad-hoc emails the most commonly used is Outlook Email Client. Now you can make sure that all those important conversations and documents are captured by Cloud Engage.

One of the key benefits of the Outlook Add-in is that people who do not normally use Cloud Engage, but who interact with members and donors, can easily ensure conversations are available to all CRM users.

Use emails strategically

For any email you are sending, or are about to receive, Outlook Add-in allows you to:

- Easily and quickly look up contacts from the Cloud Engage database

- Add any new contacts that are not currently being held in your database

- Save the email subject and content to the activity record on the Cloud Engage record

- Create links from that activity record to all of the people cc'd or bcc'd in the email

- Open the Cloud Engage record for the recipient or anyone who has been cc'd / bcc'd

- Save all relevant email attachments to the Cloud Engage record

Import supporters from Just Giving

In just a few simple steps you can now load donations from Just Giving into Cloud Engage to create new supporters or to match those already existing in your database. It's an ideal way to capture supporter details from those who have donated by using this channel.

This easy-to use feature has been added to the list of standard imports and is based on the import template provided by the Just Giving website.
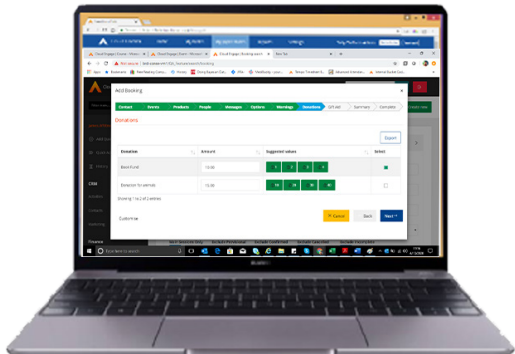
Product >
Cloud Engage

Version 20.2

Date >
May 2020

Cloud Engage V20.2

Use bookings to gain donations

When people book onto one of your events, whether through the portal or on the phone, it's a perfect opportunity to ask for a donation.

Whether the booking is online in the Cloud Engage Portal or in the back office, you can now configure event bookings so the donor or office user is prompted to add an optional donation along with their booking. Your event may be free or may have a charge, but the donation is clearly identified as such so it can be allocated for Gift Aid.

Key benefits of V20.2

> Improve data quality by

- Ensuring all communications are recorded in the CRM and not lost in Outlook.

- Importing data from Just Giving in a structured and consistent way while avoiding duplicates

> Save time by

- Not cutting and pasting emails into the CRM

- Not manually entering Just Giving donations

- Streamlined entry of donations related to events

> Increase revenue by

- Encouraging the option to add a donation when booking on events

Additional Information

These add-ins are available with Cloud Engage 20.2, released Q1 of 2020. They are compatible with Outlook 2013, 2016 and 2019 (including Outlook365) Windows Client applications.

If you would like to upgrade to Cloud Engage 20.2 please contact your Account Manager or speak to our Support Team

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