Our latest release of Cloud Engage focuses on user experience and system security, to ensure your not-for-profit organisation is efficient in securing funding and new members whilst operating safely during remote and home working.

Targeted automations

It is now possible to build automations that work on a particular dataset. This simplifies a usually complicated process by removing the need for custom views that have to be built by your administrators. A good example of when this handy feature could be used is, when sending follow ups to new members after a certain number of months, let's say 3 for this example, this will enable to you create a list of all the people who joined 90 days ago and send them the appropriate communications/pack without the need for user intervention.

Membership updates

Viewing key membership information just got easier as you can now see the joined date of each member helping to understand records and trends. To avoid complications of auto renewing memberships which include one-off charges, we have now added a 'Do Not Renew' button in the membership wizard, which can now be managed by your back office team.

Reporting control

We have extended the areas of the system that can be reported on, with additions to entities such as Organisations which previously had limited links to other data. To improve your view of your whole membership structure, we have added Committees, Branches and Districts to the list of Entities. This could be useful, for example, to a member of your head office wanting an easily accessible list of the secretaries of all committees with their email and phone number.

Manage event bookings

A new tool we are introducing to release 21.1 will enable your organisation to move bookings from one event to another. After a year of such uncertainty we realise that a series of events may not always go to plan, causing inadequate donor/member numbers to be signed up to a particular session. This release gives you the power to transfer a booking over to another session and send an automated communication to that particular donor/member.

Enhanced usability

Conveniently add contacts to organisations

Previously, it was difficult to add a contact to an organisation that isn't in the database but now when you use the search option in the Organisation field, you will find an 'Add' button above the search results.

Colour codes

A handy new feature we've introduced is the embedded colour palette dropdown on all code lists within the system, so you can highlight codes appropriately.

Gift Aid claims

The Gift Aid claim search now allows you to search using Gift Aid amount. As with all searches a trailing wildcard is assumed so if you search for claims beginning 103, you will find any claims with a Gift Aid total starting that way, for example, £1,030 or £103.50.

Cloud Engage 21.1

A more secure system

Passwords

To protect your data, we've introduced password complexity rules which will encourage users to keep sensitive data out of the hands of hackers.
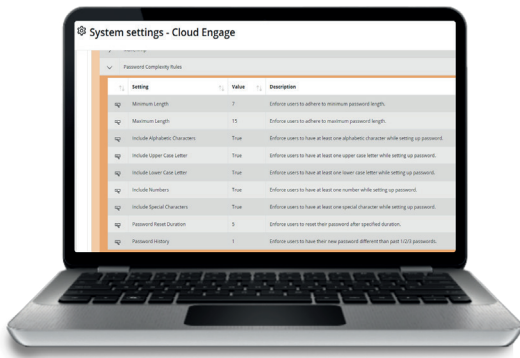
Audit Trail

Being able to track back who changed what data and when - but even more important in the context of GDPR settings - to ensure we can prove consent is valid. To help with this, we have provided ways to view the audit trail of amendments. The Audit Trail Archive sits beside the new auditing features and we have implemented a modifiable automation process that clears down the table so that it only contains 30 days data at any one time.

Additional functionality

Source code tracking

To associate source codes automatically to promotions, we have added a new button into the source code page to enable you to simple copy the short code and right syntax that can then be pasted on to the end of the URL of any page that you set up within the Cloud Engage portal. You are then free to use this extended URL in any promotional emails delivered to donors or members.

Budgets

You can now set budgets in Cloud Engage and include these in your reports so that you can analyse your finances, for example, compare actual income with budgeted income. Budgets can be set at any level of detail – so you can have a breakdown of income types or just have a single type.s

Benefits

Improve security by:

· Ensuring passwords are complex and changed regularly

· Using Multi-Factor Authentication

· Having a visible audit so you can account for all data changes

Save time by:

· Bulk transferring delegates from one event to another

· Printing server jobs direct to any local printer

· Creating organisations at the same time as new contacts

Improve Information quality by:

· Storing budget information against campaigns and events

· Using colour codes to aid correct coding

· Creating reports based on organisations

· Using hidden tracking codes to see which campaign links have been followed

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More information