



NEON Fall 2010 Update List

Our fall updates & upgrades are now released. There have not been any increases in pricing and all of these features are now active in all of our customers NEON systems. Please review the list and see all of the new things you can now do. There is something here for everyone.

Appearance & Search

- Brand New Look & Feel in NEON Database



Water

Fire

Wood

You will see a new “Theme” button in the upper right hand corner of your system for changing the color scheme for your system.

- You can now click on the items on our left menu to open and close each area, and you will see there is a tab to close the menu and push it off to the left of the screen
- There is now a new and improved Quick Search. The search will now help you easily find names with multiple parts like “Julie & John Holland Doe”. Example: “Julie Doe” would now be more easily searched.

Accounts

- Ability to add photos to the accounts in NEON. You will see an “Upload” button on each record that will enable you to easily upload a picture or logo to each record in NEON. These pictures can also be added/ updated through the person’s login.
- “Batch Conversion” now better allows you to move the data in NEON between fields. See the new “Batch Update” option listed under the “System” tab choices. This will enable you to choose the records you want to alter, and then you enter the “From” and “To” fields.
- “Preferred Name” field now available in mailing reports and emails. This field is populated by the “First Name” field of NEON unless you change this to something else. This field is now added to the <token> options.
- New fields added to the NEON account import: DOB, Gender, Household Name/Salutation, Preferred Name, and a few others.
- Ability to make the “Custom Fields” that can be seen in the “Donor/Member/Constituent

Login Area” “Read only”. So now you can show them the selections, but take away the ability for them to edit these if you would like. This “Read Only” field checkbox is now added to the “Custom Field” detail page.

Membership

- Ability to better manage “Household” and “Organizational” memberships in NEON. You can now create these types of memberships in NEON and create the rules and fees for adding the additional members. Additional members can be added through the lead person’s login.
- Ability to create multiple concurrent memberships. This enables people and organizations to have more than one membership at a time.
- Photos can now be displayed in the “Membership Directory”. The photos uploaded by your staff, as well as the photos uploaded by the people / organizations themselves will be shown if you add the “Photo” option from the field choices for the directory.
- “Membership Directory” layout improved.

Communication

- An internal NEON Mail Merge/Template Builder has been added. This will now enable you to print many of your most common letters directly from NEON without the need for mail merge. We still have our capabilities of exporting to Microsoft Word, but now you can also print many of your letters directly from NEON. You will see a new “Letter Template Configuration” area under the “System” tab for editing & creating the auto-generated letters from NEON. Most letters use a “Blank” template, or you can upload a letter template through the “Communication Settings” area under the “System” tab.
- Mail Merge “Batch” printing will now allow you to print one batch with all of the “Thank You” letters and “Receipts” for the day, and print them to multiple letter templates based on their type. Go to the “Communication Home” area in NEON to see all of the letters that need to be printed for the day.
- You can now re-send all of the letters and emails directly from person’s record in NEON. You will see icons for this next to the transactions on the people’s records in NEON. Click the appropriate icon (letter or email) to start the process.
- You will also now see a new mail icon next to a person’s email address in NEON. Click the icon here to send this person an email directly from the NEON database.
- The HTML can now be edited in our V2 templates. This enables you and our support team to easily adjust the fonts, colors, and other HTML items in your NEON V2 emails. You will see these options when you create the emails.
- Sections of the V2 email templates can now be individually edited and copied.
- Images in the V2 editor can now be better resized.
- New “Email Remove List” area added to the “Email Audience Detail Page” for managing email addresses deleted from specific email audiences. You will see this area listed under email audiences that have emails you have removed from them.

Donations

- Ability to import donations to the records in NEON from a CSV or Excel spreadsheet. Now you have even more ways to enter donations in NEON- One by one, through our “Batch”

module, or you can now import them. You will see a new option for importing both “Accounts” & “Donations” if you click “Import” under the “Account” tab in NEON.

- Ability to easily add a donation during an event registration. You can decide whether to use recommended giving levels, and/or whether to give them an open box for entering their own amount. This is now part of the event setup process, and you will see these options on the “Event Detail” page.
- Ability to enter a donor/account ID number instead of a name when entering donors into our “Batch” donation process. Just enter the number and click “tab” and the correct person will automatically be pulled up by NEON for linking the donation.
- Ability to add a default “Amount” when enter a donation into our “Batch” donation process. This is for when you receive many donations of the same amount. You will see this option when entering donations through our “Batch Donation” module.
- Improved “Soft Credits” now enables you to create “Soft Credits” on any record in NEON, not only “Solicitors. You will see a button to enter a soft credit after entering any donation. This option will be visible on the “Donation Detail” screen.
- NEON’s new “Soft Credit Link” or “Auto Soft Credit” allows you to link any two records in NEON and automatically soft credit the one record for any type of transaction that happens on the other record. One good example of this is linking the “Donations” between a husband and a wife so that whenever a donation is given on one record, it will appear on the other. This can be linked just one-way or two, and different types of activities can be linked. You will see a new area listed on each record called “Soft Credit Distribution Role”. The button under here will enable you to create these automatic links.
- “Split Donations” can now be easily added. These transactions can be split into many pieces and you can easily designate the amounts, campaigns, and percentages. After you create any donation you will see a button for “Split Donation” on top of the “Donation Detail” page.

Reports

- “Totals” added to add the NEON reports. You can now easily see the totals on the screen.
- New “Saved Reports” summary view. Click “Saved Reports” under reporting to see this.
- You can now search for the field you want to add to all your reports in the “Select Columns” area of our reporting which enables you to choose the exact fields you want on each report.
- “Donation Search” added to the “Additional Contacts Report”.
- “Last Donation Date” field added to “Donor Frequency” report.
- “Team Name” field added to “Donor” and “Attendee” reports.
- “Activity” Custom Fields added to reporting.
- “Event” Search Tab added many additional report queries.
- “Donation Note” field added to the Donation Reports in the “Select Columns” field selector.

Event Module

- Ability to create “Recurring Events”. You can now easily create events that recur daily, weekly, and monthly. Once you create an event click the “Copy Event” button on the “Event Detail” page.
- Ability to create event or membership “Packages” which can include multiple events, a donation, items from the store, and even a donation all in one package at one price. You will see an option for “Package Settings” under the “System” tab.

- Drag & drop ordering added for Ticket Prices & Sessions

Survey & Form Builder Module

- Saving capability & ability to create multi-page surveys now improved.
- “Recurring Donation” capability now added to the survey & form builder for creating “Online Donation Forms”. You will see this in the drag & drop field options.
- User/Password “Login Creation” fields added to your choices as “Login Fields”. You will see this in the drag & drop field options.
- Ability to include a “Snapshot” of the survey/form details and send them to one of your staff via email along with a Survey/Form ID Token in the email “Subject” line.

New Team Social Fundraising Module

- New workflow for the “Social Fundraisers” (your supporters) signing up to create their own personal “Fundraising Pages”. This is to help your organization encourage donations & registrations for campaigns & events. New easy workflow makes creating nice looking pages easy. If you have this optional module, try creating a new campaign, and walk through signing up as a new “Social Fundraiser”.
- New look & feel for our “Social Fundraising Pages”. New web page layout and new buttons makes for very attractive pages and increased donations.
- More color and display options for the Thermometer showing the progress toward the financial goals of the campaigns your organization is running. Once you create a campaign, you will see an option for “Thermometer” at the bottom of the “Campaign Detail Page”. Make sure to set a “Goal” for the campaign. We give you the HTML so it can be placed anywhere on the web, as well as included on the individual’s campaign pages.
- Easily add different headers for your different “Social Fundraising” campaigns. There is a new button for adding the headers for these campaigns at the bottom of each “Campaign Detail” page.

Miscellaneous

- Ability to adjust the “Display Sequence” in “Product Groups” as well as in the “Catalog”.
- “ListServ” Integration with “Electric Embers”. Synchronizes the groups that people belong to.
- Ability to pull “Friends” from a person’s Facebook site directly into the NEON database. Due to a restriction in Facebook API’s this does not work with “Fans” and “Organization” pages.
- CSV / Excel export added to the “Timesheet” area of NEON.
- “Duplicate Eraser” added to “Store” & “Membership”, in addition to the existing one for “Donations & “Events”. This takes them through a page there they enter their name & email first, and then NEON either requires login or not.
- “Back” button added to most pages for easier navigation in NEON.
- You can now configure which credit cards to accept without our assistance.

Fixes

- Layout for “Advanced Search” improved in Firefox
- When creating a “Conditional” event email you can now just enter the name of the event as

opposed to the “Number” of the event.

- Image re-sizing corrected in the V2 templates so pictures will appear in the correct sizes
- Email “Distribution Lists” can now be made invisible from the web, and can also be deleted.
- Improved conversion for “Individual” to “Organizational” accounts and vice-versa.
- “Employer” section now labeled on the NEON records.
- Reporting improved to better handle “Anonymous” donations & transactions.
- You can now properly sort by the ID numbers on all of the NEON reports - “Account ID”, “Donation ID”, “Event ID”, “Shopping Cart ID”.
- “Gender” field options now configurable
- Ability to “save” surveys has been improved.
- Ability to sequence survey questions improved.
- NEON now better handles multi-page surveys & online forms.
- Field ordering improved for the survey & form builder.
- Many other small fixes & improvements.
- Keep the Donor/Member/Constituent Login Menu when visiting store while logged in.

Winter Release 2010

- Integration with QuickBooks
- Volunteer Integration w/Events & Account Detail Page
- Much, much more.....