

What's new for 2008?

Impersonate a Donor

Admins will now be able to click one button and impersonate any of their employees in the donor site. You will not need to know their username or password, you won't have to change it that is a company requirement, and any information that you enter will have your username stamped so the audit trail on the gift is complete. This will be very helpful for the one or two pledge card situations and for your help desk walking donors through the process.

Special Events

We can now enter details on your special events in the eWay system. Entering these details does not create a transaction, nor does it impact the file you will receive for your payroll systems...but it does add the amount to the totals on the dashboard, the summary and certain reports. They are configured by donor group, company level or any of our other organizational hierarchies.

Email Server Software

There was a change in the email server software for 2008. Those companies whose firewalls blocked the eWay emails arriving in the previous method should no longer have the issues they saw in 2007. Special thanks to Rockwell Automation who helped us test the new system in Spring of 2008.

Resend Login Credentials From the Donor Grid

May change the way all of us work...for the better! You can now resend the login credentials to the donor's email address on file. No need to reset, just resend with the click of a button.

Dashboard

The dashboard functionality has been reworked to add more campaign summary type information as well as to dive deeper into the structures built for your reporting. Try it out!

Receipts

Now from the payments screen, one button will allow you to email a receipt for the donor's records on cash and check donations. You may also still print one.

Preview Emails

For those that use the eWay system to communicate with employees, a preview of the html email is now available. When filtering we also have the ability to see the total number of emails to be sent making it more clear who the intended audience will be before generating emails.

Automatic Reports

When scheduling reports to run daily, weekly, monthly, etc. you can now have a link to the report automatically forwarded to your email account. Please let us know if you would like to take advantage of this great new feature.

Add new employees

A new screen has been added to allow entering newly hired employee records directly into the administration site. You will want to use this screen for any number under 10 and provide a file to United Way if you have more than that.

Goals at the Company Level

We can now set goals at the company level for use with the company level report. Only donor group and total goals are available in pledge bar form on the donor site.

Credit Cards Gifts

Credit card contributions can now have ask questions, much like payroll deduction donations already do. This is the first step towards allowing this functionality for all of the payment types.

More canned reports!

Both summary and detailed reports are available for many of the categories.

Threshold emails

An email can now be automatically generated when a donation is received that meets a dollar amount criteria.