

Cloud Engage 20.3

New features that support your organisation's core efforts and enhance functional efficiency

Smoother membership processes

To optimise recruitment and revenue, membership organisations need to make a good first impression by ensuring the joining process is as smooth and easy as possible. Cloud Engage 20.3 helps organisations achieve this by the introduction of automatic pro-rata rate calculations that work at any period in a fixed point subscription cycle. We've also made it easier for members to pay by direct debit to ensure a user-friendly payment process. Additional functionality includes the ability to offer members special pricing on events.

Your internal administration of activities has also been reinforced and improved with new, multi-company profiles that allow you to easily separate the commercial and non-profit processes of your organisation.

Enhanced fundraising opportunities

Now you can widen your reach and gain additional funds, by adding a very simple donate button to your own, or 3rd party, websites. This process removes the barriers of registration or log-ins, making it easier for those who want to support you. Users are given the option to specify whether the donation is a one-off or recurring and whether they would like to gift aid their donation. All captured donations flow directly into Cloud Engage.

We've also streamlined the communications process for major donors. While standard supporters and donations have always had automations to streamline the sending out of packs using document templates, this capability is now available for all opportunities including any grant applications, legacies, major donors, and pledges.

An enriched user experience

The search function within Cloud Engage 20.3 has been optimised to help users navigate through their work more quickly with searches that now display a wider breadth of results.

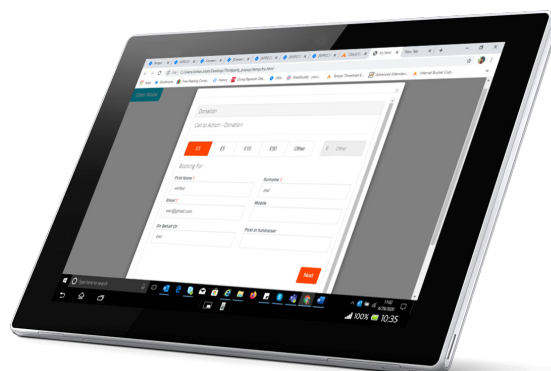
We have added a create button to the top of Cloud Engage that allows users to quickly access their most commonly used data entry processes. Currently this provides instant access to multiple functions including, add new items, bookings, donations, memberships, persons, organisations and events.

Product >

Cloud Engage
Version 20.3

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Key benefits: Memberships

- Pro-rata pricing: If your membership is based on single annual renewal date, you can ensure new joiners automatically pay the correct amount no matter what time of the year they join.
- Member pricing: You can now easily offer members special pricing for any of your events or products.
- Multi Company: Cloud Engage now supports multiple selling companies. This enables the segregation of accounts, bookings and supporters between the commercial trading and non-profit activities of your organisation.
- Direct Debits: DD's are a key part of any membership process, so we have added enhanced functionality to make the process even smoother.

Key benefits: Fundraising

- You can now create a donate button on your own, or 3rd party, websites to capture additional donations that will automatically flow through to Cloud Engage.
- We have added packs and automations to all opportunity types in order to streamline communications with major donors. We've also added an end date to advise you when an opportunity is completed.

Key benefits: All users

- A single field search option is now available at the top of every page, making it easier to find what you need. When you perform a search, the search fields now collapse so you can see more of your search results.
- A create button, is now present at the top of every page to make it much quicker to start entering new data of any description.
- The TBA (To Be Announced) feature, allows the convenient booking of multiple places on any event while enabling confirmation of names at a later date. Enhanced functionality has also been incorporated to make this feature more flexible and easier to use.
- When you purchase the Outlook Add-in you can now easily install it from the back office.



If you would like to upgrade to Cloud Engage 20.3 please contact your account manager or speak to our support team

More information

w oneadvanced.com
t +44(0) 330 343 8000
e hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy.