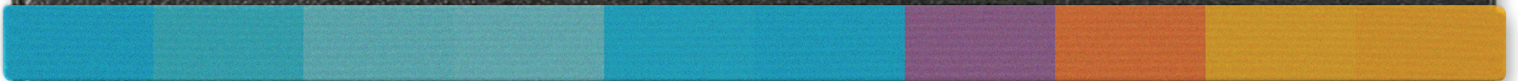# engaging
NETWORKS
SOFTWARE LOVE

Product Development

Journal - 2018

2018 Product Development Journal

Whenever I'm asked to explain the success of Engaging Networks, my response is always the same: 'we are a product-driven company'. We invest the revenue from our clients back into the development of the product like nobody else.

I have overall responsibility for what we build every year. It's the most interesting part of my job hands down. Outside of our formal development tools I keep a running tab of what we release during the year, and I thought it might be interesting to share my notes with our clients and friends. Think of it as a sneak peak into how I track what we prioritize and what we deliver. The writing isn't always pretty but I hope my notes tell a story of innovation, hard work and amazing output.

It will be more of the same pace of great innovation in 2019. Stay tuned for the 2019 Technology Roadmap.

Graham

Graham Covington
Founder & CEO
Engaging Networks Limited

## Release Date: February 16th, 2018

- page-builder: implemented 'editable area' in ETT pages where the client can create a template message but permit supporters to edit portions of it (as opposed to HTML or plain text messages);

- page-builder: a function for clients to build an address block in an ETT page;

- page-builder: notification emails for event transactions are generated; the notifications shows individual transaction details including number of tickets purchased at each level, promo used, donation made, etc.;

- page-builder: for the events page type the attendee block is more flexible (e.g. for a ticket type it is possible to customize which attendee fields are displayed to the user);

- page-builder: added HTML5 field type for email and phone number; this will auto-populate data and auto-complete data;

- account: validate the client account session, and retire the session after 4 hours of inactivity;

- UDX: a query for events to isolate individual transaction types (ETK ECS ETA.);

- marketing automation: a new template option for birthday and credit card expiry;

- marketing automation: a new feature to allow clients to view the records of all supporters active on any workflow;

- marketing automation: a new option to pull down the list of all records that soft / hard bounced;

- marketing automation: improved the UI to view the workflow screen to make it easier to navigate around more complex workflows;

- page-builder: a tool to manage components and know which pages are using the component;

- ENS: a new service to pull all supporters that have been modified from a specific date;

- ENS: a new service to pull all supporters created from a specific date;

- ENS: a new service to expose all supporters tagged to a specific profile;

- ENS: a new service to pull the aggregate number of supporters tagged to a specific profile;

- ENS: a new service to pull all constituent records that have suppressed email address;

- page-builder: client can hide the opt-in question on a landing page from email so that the stored opt-in status will remain unchanged (account setting);

- UDX: added marketing automation filters (sub-filters for messages within a workflow);

- account: storing and remembering client account user preferences (e.g. column sort);

- account: client users have the ability to re-name jobs;

- page-builder: automatically expire a page (close the page and add re-direct URL);

- page-builder: localization is added for display widgets and the ability to customize text around the widget;

- page-builder: the amount field on donation pages can include dynamic gift strings based on 'highest previous contribution' calculation;
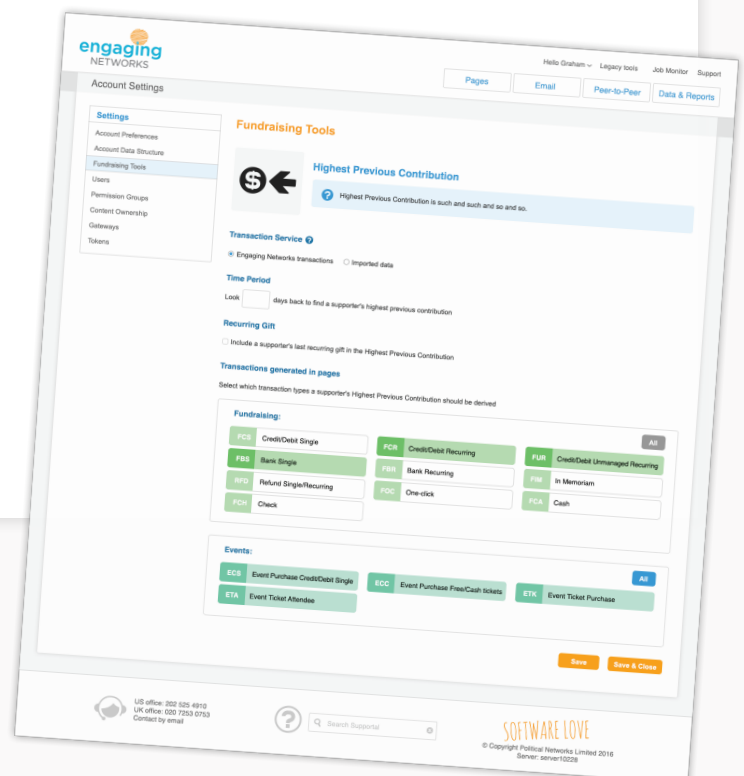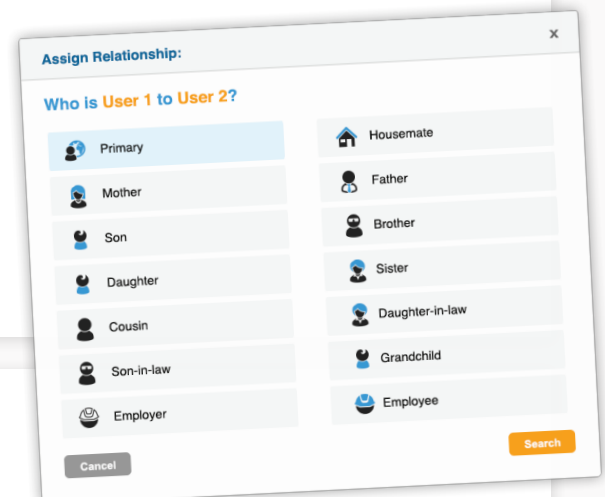
Release Date: April 20, 2018

- GDPR: display the sequence of QCB responses in the 'transactions' gadget in Manage Supporters;

- page-builder: added split receipting – create multiple receipts for a single donation (apportion to different funds);

- page-builder: added a function where donors can make a donation and receive a 'premium';

- GDPR: added an audit log for opt-in response, and specifically the wording of the opt-in question for each change, in the Manage Supporter gadget (include QCB transactions in the transaction gadget in Manage Supporters);

- GDPR: permitting HTML (link insert e.g. 'click here to view our privacy policy') into question label (we will also create a copy block option to write in the privacy policy from the link so that copy changes can be recorded as part of the audit trail);

- GDPR: when importing constituent data with a value for opt-in question, generate a transaction record;

- page-builder: PopVox integrations for web form submissions to regulations.gov;

- WorldPay gateway: changes to the Bill Pay integration;

- bulk email: changes to links inserted into emails (shorten the length);

- data API: emails that have been sent via the marketing automation tool are available via the API;

- profiles: added a new profile to identify recurring donors based on status and timeframe;

- account: image library overhaul (complete re-build);
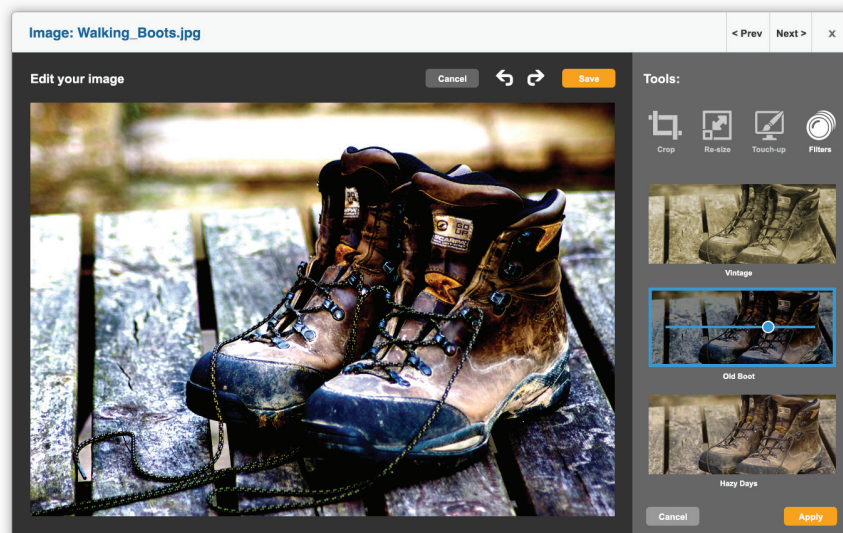
Release Date: June, 2018

- account: added two factor authentication for client account login;

- data: added tools to store the 'origin source' of every record that will help to build more complex profiles, add reporting insights (the 'origin source' values are created for records that are processed via pages and imported records);

- Stripe: new payment processor integration;

- account: created infrastructure to build household records, associating records under a 'parent record' and added tools to manage household records in the Manage Supporter account page;

- account: added a back-end process to detect possible duplicate records using a 'fuzzy match' logic, including tools to view and merge records manually, or via a bulk process;

- marketing automation: added Google Analytics for tracking page conversions;

- data: added campaign reference fields for people converting a page coming from a marketing automation workflow – data available through export API;

- profiles: updated to include a '0' email engagement score – no activity;

- bulk email and marketing automation – when you insert a page URL (link) a layer pops up to add custom URL parameters;

- page-builder: PopVox API integration – enhancements;

- account: asset library improvements (e.g. 'copy URL' button);

- account: updated 'manage supporter' gadget to expose the transaction data field values;

- page-builder: added opt-in questions to the 'components' menu;

Assign Relationship:

Who is User 1 to User 2?

Primary	Housemate
Mother	Father
Son	Brother
Daughter	Sister
Cousin	Daughter-in-law
Son-in-law	Grandchild
Employer	Employee

Cancel   Search

Release Date: July 27th, 2018

- master dashboard: content sharing between accounts via the master dashboard for all of the following page types: fundraising, data capture, petition);

- master dashboard: sharing of HTML wrappers;

- page-builder: a new function for simple 'page view' editing of wrappers, eliminating the necessity to do this only via HTML;

- payment processor: update to the Vantiv API specifically for recurring transactions;

- page-builder: integration of PopVox to send messages to US Senators with difficult forms;

- payment processor: Paypal IPN - generate 'success' status transaction if status gets updates from PayPal;

Release Date: September 28th 2018

- page-builder: release of the eCommerce module for symbolic giving, including product catalogues, split receipting, and integration into data and reporting functions;

Release Date: November 30th 2018

- page-builder: new page type for membership; moving over all of the functionality of the legacy pages for membership;

- UI: port over 'email bounce' screen from legacy dashboard;

- UI: port over 'Manage Account Emails' screen from legacy dashboard;

- master dashboard: added 'code blocks' to blueprint pages created for sharing to sub-accounts;

- UI: added 'search' within folders for email campaigns (update to work like page builder search);

- marketing automation: 'drag and snap' issues were resolved creating complex workflows;

- marketing automation: optimized the back-end send process;

- account: 'origin source' values can be queried through the UDX;

- page-builder: added a function to upload products into the e-commerce module;

- account: 'origin source' values can be used to build profiles;

- the hub: donation gadget will display negative amount if last gift was refunded;

- ENS: the API can be used to programmatically run reports (e.g. use a saved queries to pull data through the API).