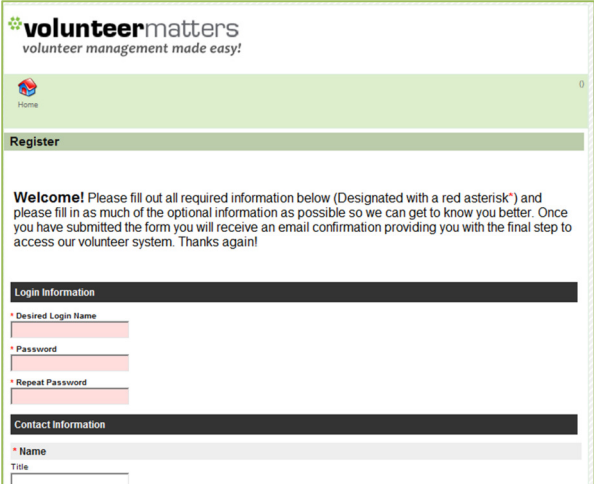


We are pleased to announce the upcoming release of VolunteerMatters. These updates while extremely helpful will not substantially change the system's interface so there's no "training" required. We just want to make sure you know these features are now available to you. There is nothing you need to do to receive these improvements and they are all included in your subscription. On Monday 05/13/2012 there will be a number of system improvements including the following highlights:

- Improved Volunteer Application / Self Registration Form
- Advanced Searches in Contact Chooser
- Improved Contact Quick Find
- Exports Galore!
- Group List Views to Keep Things Organized
- Improved Address Exports from List View
- Easily Research a Volunteer's Requirements as of a Specific Date
- Improved 'OR' Filter Mechanism for Reporting
- Filter on 'Current Placements' in More Reports
- View Volunteer Opportunities with "Open Slots"
- You Can Now Customize the Field Groupings in 'My Profile'

Improved Volunteer Application / Self Registration Form

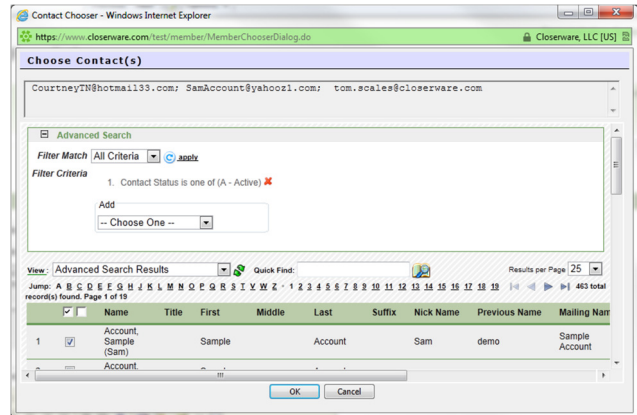
In short, we made the volunteer registration form better looking, more customizable, and smarter. The new default styling utilizes more page width, and gives a clearer delineation between form sections and fields. We've also changed the way we implement field help text so that the text is always displayed (rather than having to click a help link for each field). Pro and Enterprise customers don't have to stop there. We can implement your own stylesheet to use any colors, fonts, or styles you wish to match your brand (contact support for more details). We can also add JavaScript to your form to show/hide fields or entire sections based on a registrant's earlier field responses (contact support for more details).



The screenshot shows the 'Register' page of the VolunteerMatters system. At the top, there is a green header with the 'volunteermatters' logo and tagline 'volunteer management made easy!'. Below the header is a navigation bar with a 'Home' link. The main content area is titled 'Register' and contains a welcome message: 'Welcome! Please fill out all required information below (Designated with a red asterisk*) and please fill in as much of the optional information as possible so we can get to know you better. Once you have submitted the form you will receive an email confirmation providing you with the final step to access our volunteer system. Thanks again!'. The form is divided into two sections: 'Login Information' and 'Contact Information'. The 'Login Information' section includes three required fields: 'Desired Login Name', 'Password', and 'Repeat Password'. The 'Contact Information' section includes a required 'Name' field and an optional 'Title' field.

Advanced Searches in Contact Chooser

Now when using the chooser to send emails, run letter merges, assign requirements, track placements, or anywhere else you can now perform an "advanced search". This allows you to perform quick searches on cross-sections of your contacts without having to formally create a "view".



Improved Contact Quick Find

Quick Find now searches all words entered against all name and membership ID fields. Previously, it looked for an exact match in any single name field. This improvement will expand search results and make it much easier to find similar records. For example, if you type 'Jane Smith' in the quick search, the system will return all contacts that have Jane or Smith in any of the name fields (title, first, middle, last, previous).

Exports Galore!

You may now export the results of any list view to a spreadsheet format. This was previously reserved for the contact list alone, but admins may now perform this function when viewing lists of volunteer calendars, volunteer opportunities, volunteer interactions, and giving interactions. Volunteers/members can also perform their own spreadsheet exports from the volunteering tab in 'My Profile' on the volunteer history as well as upcoming assignments. Look for the Excel/Spreadsheet icon at the top-right of your list views.



Group List Views to Keep Things Organized

You can now assign your public and private list views to groups to keep them better organized. When editing an existing view or creating a new one there will be a new field for 'Group'. The system will automatically group the views in the drop-down lists alphabetically by group, then by view.

The screenshot shows the 'Contact Database' interface. At the top, there's a 'View:' dropdown set to 'Active Contacts' and a 'Quick Find:' search box. Below that, a 'Jump:' dropdown is set to 'A' and '1 of 19' is shown. The main table has columns for 'Primary Telephone', 'Primary Address', 'Group', and 'Photo'. Three rows of contact data are visible, each with a photo. A sidebar on the left contains a menu with categories like 'Shared Committee', 'Partners/Groups', 'Skills', and 'Status', with 'Active Contacts' currently selected.

Improved Address Exports from List View

You could previously perform a contact detail export from the reporting section of the product to get contact address fields in separate columns of a spreadsheet (address1, address2, city, state, postal code, Country). Previously from the list view export it included the entire address is a single cell in the spreadsheet. Now when you perform a one-click export of any contact list view the address field will also be broken out into separate columns.

Easily Research a Volunteer's Requirements as of a Specific Date

When an administrator is researching a contact's requirements the system previously listed all requirements and fulfillments for that contact since the beginning of time. You may now filter the view to show requirements and fulfillments as a specific date to make the review of information more relevant and less cluttered. As always, a volunteer/member will only see current requirements and fulfillments from the 'My Profile' screens. When an administrator is viewing the Requirements tab on a contact record the display will default to show all requirements/fulfillments as of today. To research past requirements, simply change

The screenshot shows the 'Contact Record' interface for 'Miss Sample Account (Sam)'. The 'Requirements' tab is selected. Under 'Requirements and Fulfillments', there's an 'As of date' filter set to '2012-05-10', which is circled in red. There are 'today' and 'refresh' buttons next to it. Below this, there are two sections: 'Attend Volunteer Training' and 'Dues for Active Members', each with a table of data.

Type	Date	Points	Notes
Attendance	Jun 6, 2011	1.00	

Type	Date	Points	Notes
Dues	Mar 2, 2007	50.00	partial payment
Dues	Oct 3, 2006	50.00	Paymnet received week of 9/30/2011

the as-of date using the calendar control (e.g., selecting a date from last year to see last year's requirements)

Improved 'OR' Filter Mechanism for Reporting

When defining filters for reports you may now easily add 'OR' filters for volunteer history, giving, attendance, and communication interactions. For example, you may create a quick filter to only include giving interactions that belong to either the annual fund OR the casino night fundraiser. Previously when running these reports you could only include filters where the type (or in the case of giving interactions - campaign) equals, starts with, ends with, or contains a specific value - where you would have to type in the value from memory. Now, you will be able to select one or more checkboxes of the previously defined values and the filter will include interactions of any of the selected types or campaigns.

Filter on 'Current Placements' in More Reports

You may now filter reports by 'Current Placements' in the volunteer history, giving, attendance, and communication reports. For example, you could easily filter a report to only include volunteer history for members of your board or those who are associated with a specific committee. For example, when running a volunteer history report, you may set a field filter. You will now notice an option where you can define to only include contacts whose current placements equal, start with, end with, or contain a specific value. For example, if you wanted to include all members of the communication committee you could specify to include all contacts where their 'Current Placement' contains the word 'communication'.

View Volunteer Opportunities with "Open Slots"

<input checked="" type="checkbox"/>	Shift	Date	Start Time	End Time	Assigned Count	Max Slots	Open Slots	
<input type="checkbox"/>	Read to Children	2012-05-10	9:39 AM	10:39 AM	0	3	3	edit Add Assignment
<input type="checkbox"/>	Sample Volunteer Opportunity	2012-05-10	12:00 PM	3:00 PM	1	5	4	edit Assignments
<input type="checkbox"/>	Sample Vol Opp	2012-05-11	3:21 PM	4:21 PM	1	10	9	edit Assignments
<input type="checkbox"/>	Sample Volunteer Opportunity	2012-05-12	12:00 PM	3:00 PM	0	5	5	edit Add Assignment
<input type="checkbox"/>	Sunday Morning Childcare	2012-05-13	9:30 AM	11:30 AM	0	3	3	edit Add Assignment
<input type="checkbox"/>	Sample Vol Opp	2012-05-14	3:21 PM	4:21 PM	0	10	10	edit Add Assignment
<input type="checkbox"/>	Sample Volunteer Opportunity	2012-05-15	12:00 PM	3:00 PM	0	5	5	edit Add Assignment
<input type="checkbox"/>	Sample Vol Opp	2012-05-16	3:21 PM	4:21 PM	0	10	10	edit Add Assignment

Previously the system showed the number of people currently assigned to a volunteer and the max number of people that could be assigned to it. The administrator would then have to infer from this information where there was availability for additional volunteers. This latest release calculates the number of open slots (max count minus currently assigned count) which enables an administrator to show this value in the list view or even filter on it. When creating a new view or editing an existing one, you can edit the list view columns to include "Open Slots" and you may also edit the List View Filter to add a filter where the 'Open Slots' equals, does not equal, or is greater than any value you define (the most common being where 'Open Slots' is greater than zero to show all opportunities with availability)

You Can Now Customize the Field Groupings in 'My Profile'

Previously the product allowed you to configure which fields a volunteer could view and/or self-manage about themselves. We've taken things a step further and now allow you to customize how those fields are grouped when presenting to the volunteer/member. To update the field grouping for 'My Profile', visit Setup / My Profile Page Layout. The setup utility uses the same approach as setting up the grouping of fields for the administrative view of a contact record. For more information please refer to the "Grouping and Organizing Contact Fields" section of the VolunteerMatters User Manual.