

# ServiceReef.com

New Enhancements for 2015

# Summary

- ServiceReef already makes it easy to create and manage short-term trips.
- This year, we added several features to make it even easier for Admins, Trip Leaders, and Participants.
- Let's take a look at some of these enhancements for:
  - Admins
  - Trip Leaders
  - Participants
  - Donors

# Admin Enhancements

# Admin Enhancements

- Customized Email Text
  - Additional configuration costs may apply
- Formatted Trip Descriptions
- Additional Admin and Trip Leader Permissions
- Story Posting and Approval
- Master Application

# Email Configuration

- Make it easier to customize your communication by editing the default text for Organization and Trip level system generated messages


## Edit Your Event Message For Registration Confirmation

Use the Data Values below to add dynamic content to your emails that will populate for each individual recipient. For example, "Hello {UserFirstName}", will populate as "Hello Bill" on the email that Bill receives.

### Data Values

User    Event    Organization    Meeting    Advanced    Donations

Log in    Manage User Preferences    User Dashboard    User Notifications



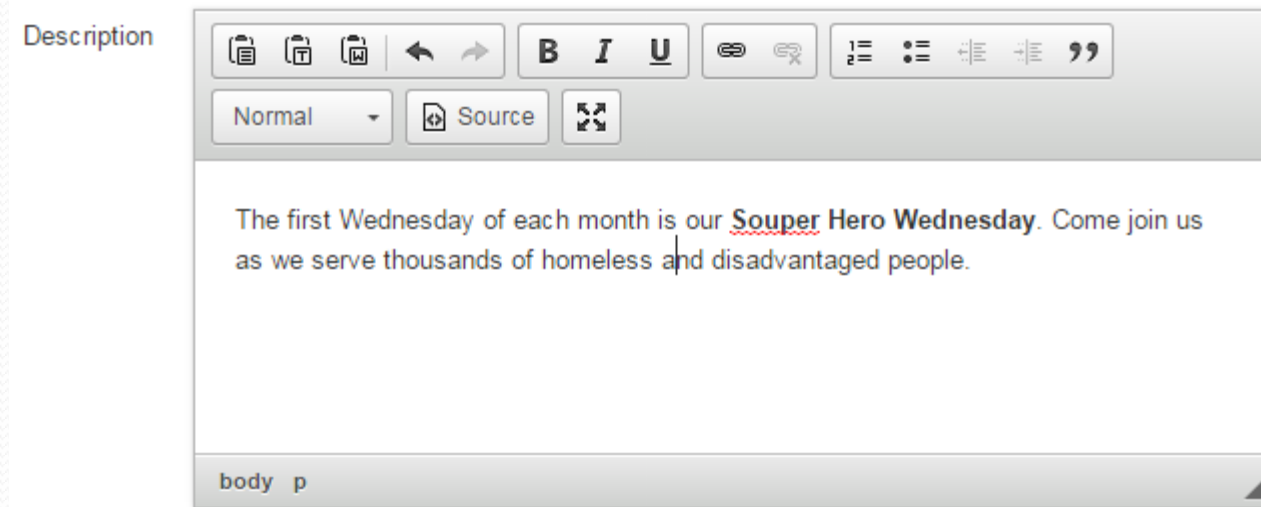
{ParticipantFirstName}.  
{ThankYouForSigningUp}  
{PersonalEventPage}  
{EventDetails}

body p

Save Changes    Cancel    Revert To Original Message    Send Test Email





# New Trip Descriptions

- Market your trip more effectively by adding formatted text in your Trip Descriptions (WYSIWYG Editor)



# Permissions

- Additional Permissions on the Organization and Trip level to provide an additional layer of security

User	General	Manage Users	Get Notifications	Trip Finances	Participant Fundraising	Donation Details	Application	Communications	
Jen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sheryl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cindy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Connie	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

[Save Changes](#)

# Story Management

- Admins can now post stories without needing to be a trip participant
- Additionally, Organizations can approve stories prior to having them display on story/donation pages

## Privacy

Privacy Level

Organization Only - Visible on your organization page and y ▾

Hide similar opportunities?

Approve stories before they are published



# Master Application

- Organizations can now have a Master Application that allows for participants to save their responses between trips (thereby making applying easier)

Create a master application to use across your trips

Whenever someone registers for an opportunity, you will get their basic information (name, email, phone, and address). Only create application questions for additional information that you need, like if they need to submit [View More...](#)

\*\*\*

Before you register please make sure you have the following items ready:  
-Copy of passport to upload  
-If applicable, date of prior CHCC background check. (Adults only. Prior background check must have occurred within past two years)

Team Leader

First Name \*

Add Edit

Drag or click one of the question types to add it.

Single Line Text

Paragraph Text

Drop Down List

Single Selection (Radio buttons)

Multiple Selection (Checkboxes)

Section Break

Upload File

Page Break

Section

# Additional Enhancements

- The Stripe Batch ID is now included in exports, making it easier to see which transactions are in each batched deposit
- Each Trip now has a Project Code, allowing you to tie each donation to your internal accounting code
- Move participants from one trip to another
- Printer friendly applications (for reviewing them offline)
- Set a maximum number of applicants per trip. When that number is reached, no other participants can apply until you start making decisions on those in the queue
- Hide donation amounts from participants

# Trip Leader Enhancements

# Trip Leader Enhancements

- New Participant Exports
- Change Fundraising Goals for each Participant
- Trip Budget Builder
  - Currently in Beta – will be available in Q1 2016
- Move participant from one trip to another

# Additional Exports

- Trip Leaders can now download a donations list to excel, which allows easy access to all participant data and fundraising goal progress

Review the donations and payments made to this event

**\$9,138.70**

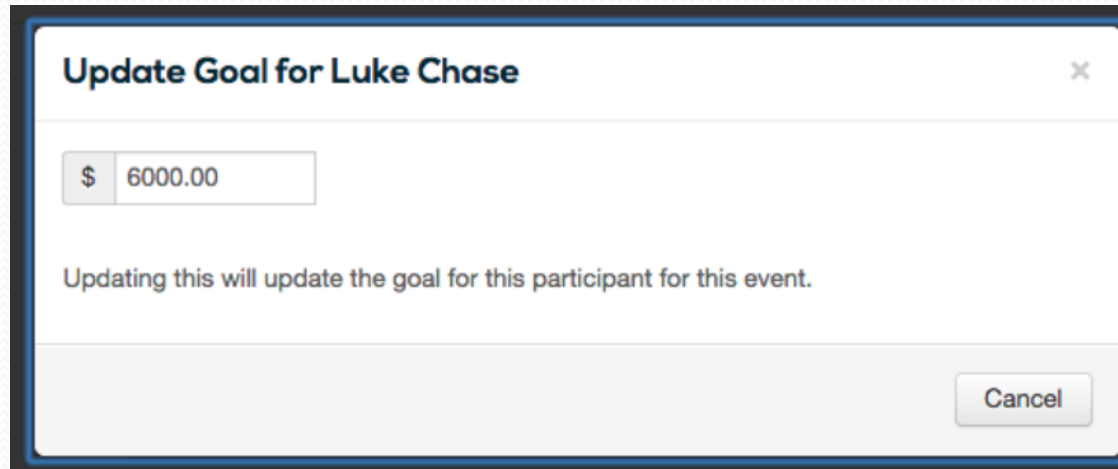
Total

Export Donations & Payments

Donor	Registrant	Email	Type	Amount	Order Number	Date	Actions
Melinda	Cindy	3@aol.com	Online Donation	\$9,138.70	4661	Oct 25, 2015	Actions ▾

# Change Fundraising Goals

- If a participant is flying in from another location, or needs to raise a different amount than others, this can now be edited via the Participants > Actions dropdown



Update Goal for Luke Chase

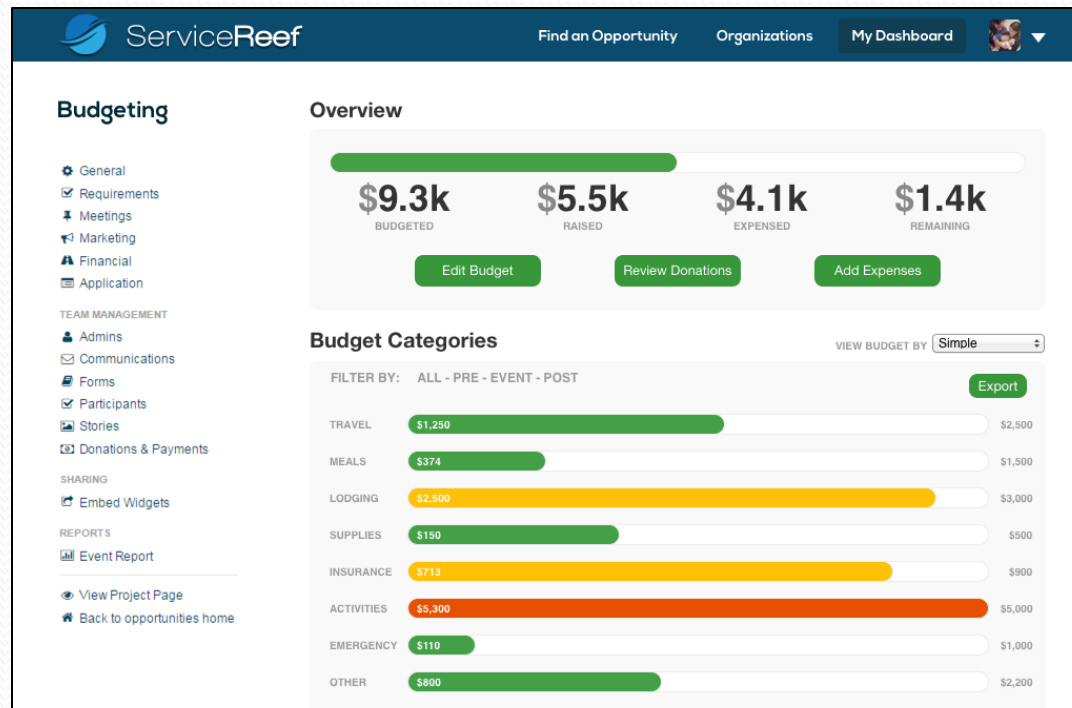
\$ 6000.00

Updating this will update the goal for this participant for this event.

Cancel

# Trip Budgets

- Trip Leaders can now track their budgeting for their trip. Enter expenses into various categories to track progress towards goals.



# Move Participants

- Trip leaders (or Organizational admins) can now move a participant from one trip to another (e.g. if the trip is cancelled or the participant can't make it). This moves the user, all of their data, and all of their donations to the new trip.

**Move Ervin Weaver** ✕

Please choose the trip to move Ervin Weaver to.

From MyFromProject

To

Note: This is a one time action and cannot be undone. We will move the user to the new trip, along with any associated trip data (registrations and application data).



# Trip Leader Communication

- Trip Leaders can still communicate easily with team members through ad-hoc email blasts
- However, now the organization can tailor the system generated messages on each trip
  - Additional configuration costs may apply

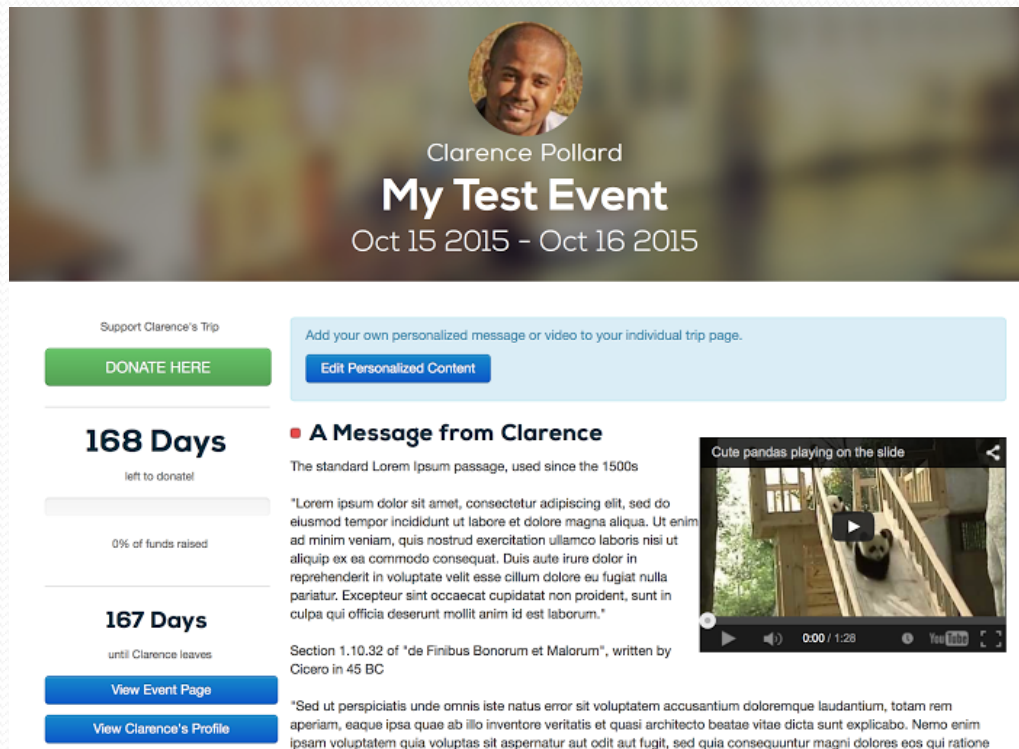
# Participant Enhancements

# Participant Enhancements

- New Individual donation page
- Manage Households and Family Members
- Master Application Saves Applicant Data

# Personal Donation Page

- Participants get their own individual donation page, which makes it easier to raise funds and update friends/family



The screenshot displays a personal donation page for Clarence Pollard's "My Test Event" (Oct 15 2015 - Oct 16 2015). The page features a circular profile picture of Clarence Pollard and a green "DONATE HERE" button. A progress bar shows "168 Days left to donate!" and "0% of funds raised". Below this, a section titled "A Message from Clarence" includes a video player showing "Cute pandas playing on the slide" and a text area with placeholder text. The page also includes a "View Event Page" button and a "View Clarence's Profile" button.

Support Clarence's Trip

[DONATE HERE](#)

Add your own personalized message or video to your individual trip page.

[Edit Personalized Content](#)

**168 Days**  
left to donate!

0% of funds raised

**167 Days**  
until Clarence leaves

[View Event Page](#)

[View Clarence's Profile](#)

**A Message from Clarence**

The standard Lorem Ipsum passage, used since the 1500s

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

Section 1.10.32 of "de Finibus Bonorum et Malorum", written by Cicero in 45 BC

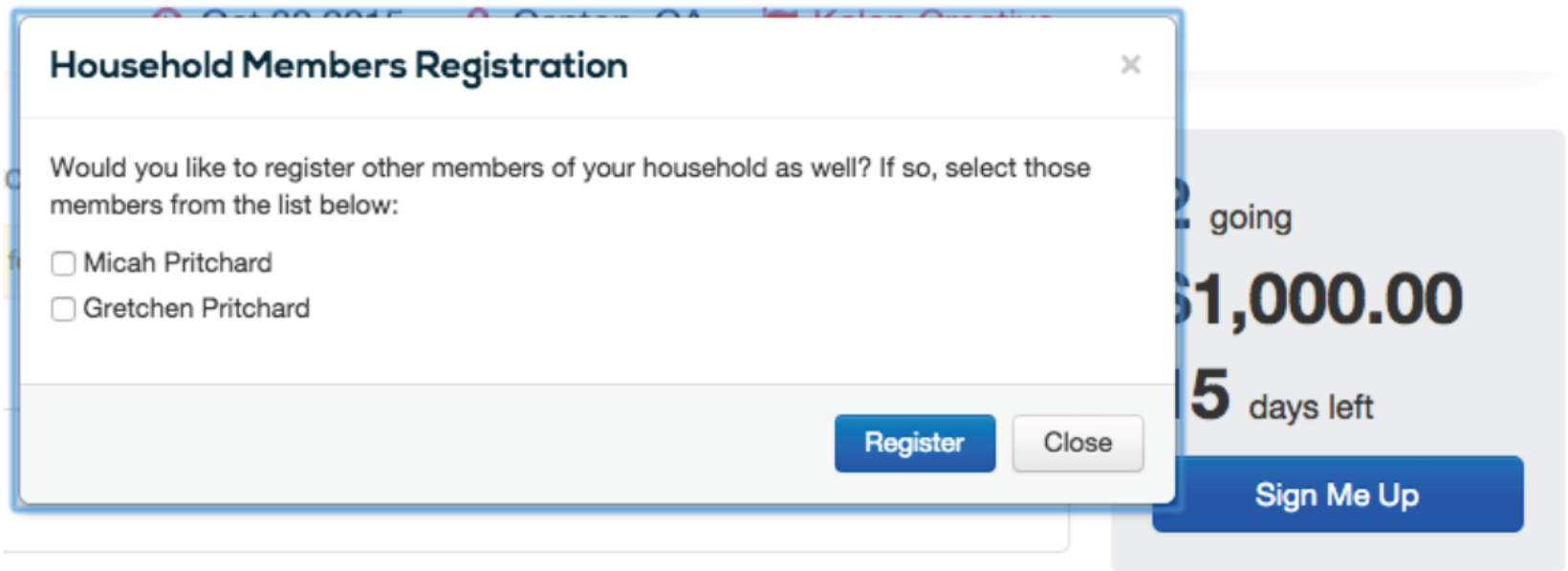
"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione

Cute pandas playing on the slide

0:00 / 1:28

# Participant Enhancements

- Participants can now create Households (e.g. spouse, children) and register or apply for a trip as a family



The image shows a screenshot of a web application interface. In the foreground, a modal dialog box titled "Household Members Registration" is open. The dialog contains the following text: "Would you like to register other members of your household as well? If so, select those members from the list below:". Below this text are two checkboxes: " Micah Pritchard" and " Gretchen Pritchard". At the bottom right of the dialog are two buttons: a blue "Register" button and a grey "Close" button. In the background, a grey card displays trip information: "2 going", "\$1,000.00", and "5 days left". At the bottom of the card is a blue "Sign Me Up" button.

**Household Members Registration** ×

Would you like to register other members of your household as well? If so, select those members from the list below:

Micah Pritchard

Gretchen Pritchard

**Register** **Close**

2 going  
**\$1,000.00**  
**5** days left  
**Sign Me Up**

# Participant Enhancements

- Master Application saves each applicant time as it stores that data for future trips, allowing applicants to verify data without needing to re-enter data on each successive application.

# Donor Enhancements

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- With the participant's individual fundraising page, donors now have the ability to learn, donate, and read updates in a single location
- Additionally, Donors receive an alert when a story is posted to a trip they support... so they can view the impact that their donation had in other people's lives
- Annual Donor Report that allows donors to view their giving patterns from the year and what type of impact they supported



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