

New Experience for Notifications

Product Announcement: June 16, 2017

Summary

A new experience for Notifications is now available to the Reeher Platform. Email notifications have been available in the platform for some time now, and Activity Center users will be familiar with alerts that appear in the Platform's Drawer area. The actionable information found in our email notifications is now visible directly in the platform. Immediately on login, users will be able to see and click into notifications, allowing them to take action directly as new information comes into the platform.

Email notifications are also receiving a fresh, new experience. The new daily and weekly digest emails group information into a single email for the day and/or week, summarizing updates in a concise, easy to read format. In the previous format, users would receive each type of notification as a separate email.

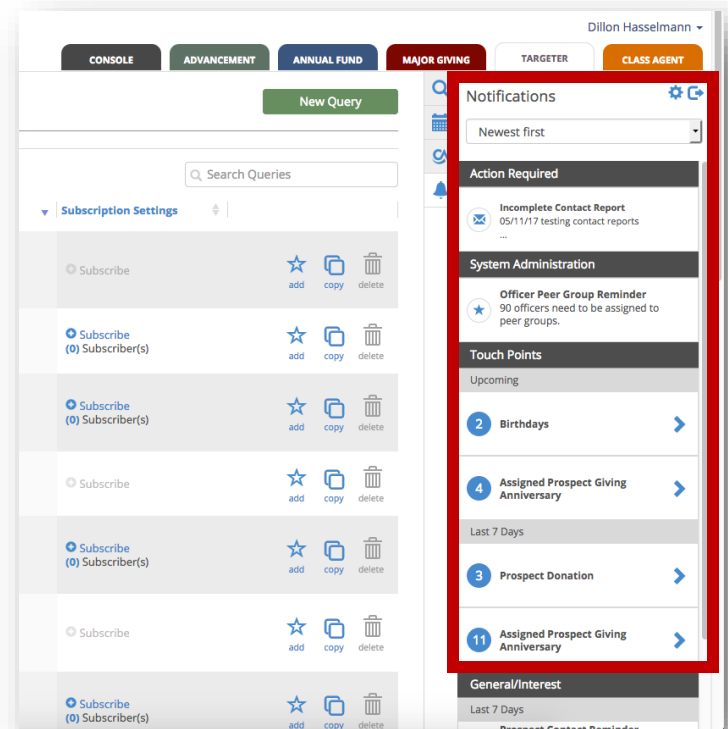
Notification settings will be available right from the notifications section in the drawer, enabling users to change their settings quickly and easily. Previously, users could change their notification settings only from the Control Panel.

The new experience for notifications is planned for release on June 16th, 2017.

What is New?

In-Platform Notifications

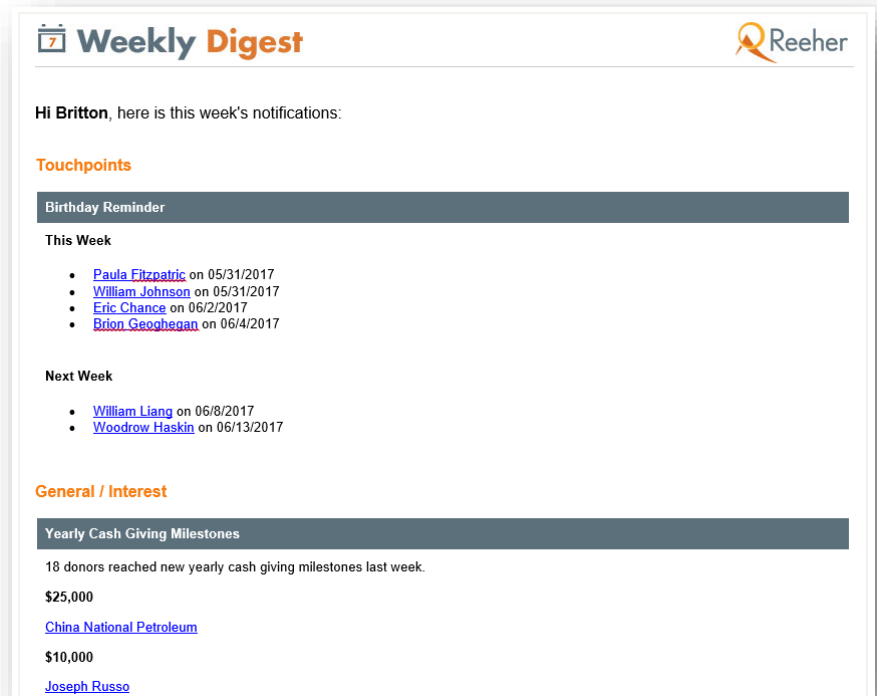
This new update for notifications allows users to view all their notifications, including birthday reminders, milestones, and Activity Center updates, in a single location in the Platform. Users will see these updates in the Drawer (highlighted in Red in the screenshot), which can be accessed from any page. When new unread notifications are available, a badge will appear on the Notifications section of the Drawer. In addition, all of the notifications are linked, so users can drill in and take action through the Platform.




Digest Emails

Email notifications are now rolled up into a daily and weekly digest, providing a concise summary of notifications for the day and week. For example, suppose a gift officer is signed up for the “Assigned Prospect Birthday Reminder” notification and the “Assigned Prospect Giving” notification. This gift officer would see both of those notifications summarized in a single email as a daily or weekly digest, depending on his/her settings.

Daily digests typically show activity for the previous, current, and next day, where applicable. For example, the daily digest would show all assigned prospect birthdays for today and tomorrow, and would show all assigned prospect giving from yesterday. Similarly, the weekly digest shows activity for the previous, current, and following week, where applicable.



Weekly Digest 

Hi Britton, here is this week's notifications:

Touchpoints

Birthday Reminder

This Week

- [Paula Fitzpatrick](#) on 05/31/2017
- [William Johnson](#) on 05/31/2017
- [Eric Chance](#) on 06/2/2017
- [Brion Geoghegan](#) on 06/4/2017

Next Week

- [William Liang](#) on 06/8/2017
- [Woodrow Haskin](#) on 06/13/2017

General / Interest

Yearly Cash Giving Milestones

18 donors reached new yearly cash giving milestones last week.

\$25,000

[China National Petroleum](#)

\$10,000

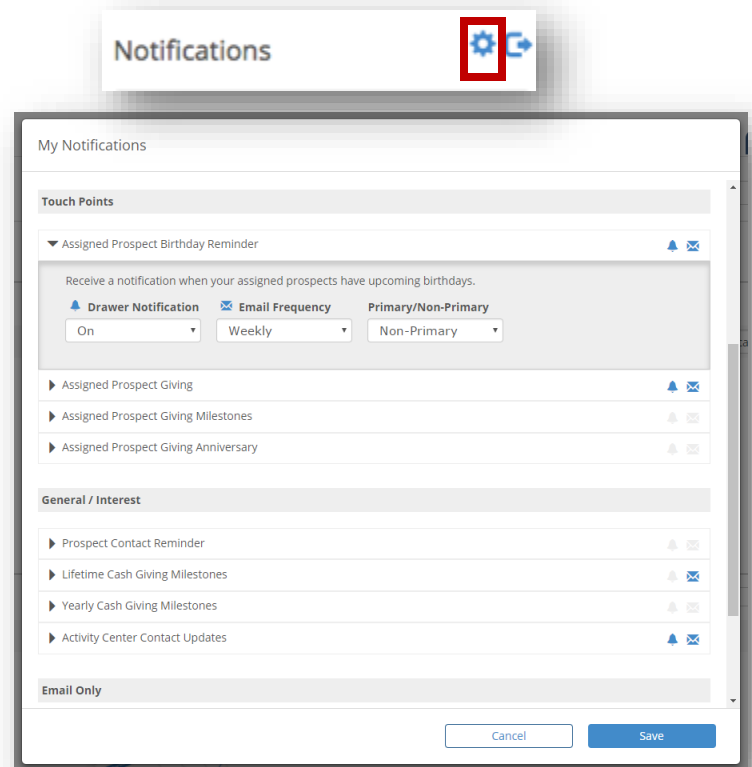
[Joseph Russo](#)

There are a few emails that will remain separate from the daily and weekly digests. These include “Email Only” notifications which contain a lot of content, such as the Class Agent Summary and Activity Center Summary. There are also some email notifications which are sent immediately, rather than appearing in the digest, such as notifications for assigned tasks.

Easy Access to Settings

Notification settings can be accessed from anywhere in the Platform through the Drawer. Users can click the gear icon from the Notifications section of the Drawer manage their notification settings. Notifications can be setup to be delivered only through the Drawer, only through email, or both.

In addition to managing their own settings, users can also subscribe other users to notifications. If one user finds a particular notification especially valuable, this makes it easy for them to sign up other members of their team. Users will be notified when they've been subscribed to a notification or their settings have been changed by another user.



What Has Changed?

Notification emails rolling up into daily/weekly digests

Previously, if a user signed up for multiple notifications, they could receive several emails on any given day. For example, a user could receive an Assigned Prospect Birthday Reminder email and an Assigned Prospect Giving email on the same day. Now, those notifications are rolled up into daily and weekly digest emails. Within the email, the different types of notifications are split out into several categories, so that they are easily identifiable and users can quickly jump between sections.

Monthly email notifications changing to Weekly

Previously, most notifications had the options of daily, weekly, or monthly updates. Notifications can now be received through email either daily or weekly, and will be rolled up into the daily digest or weekly digest. Users who were previously signed up to receive monthly notifications will now receive them in their weekly digest.

Notifications will be enabled for new users based on role

In prior versions of the platform, a new user needed to find the notification settings on their own and sign up for them manually. Depending on the role assigned for the new user, some users will now be automatically enabled for specific notifications immediately upon their first login. For example, anyone with a Gift Officer role will have the Assigned Prospect Birthday Reminder notification enabled. Users can change their notification settings any time by clicking the gear icon in the Notifications section of the Drawer.

Notifications enabled for existing users based on role

As a one-time conversion for existing users, some notifications will be enabled for certain users depending on their role. No settings will be changed for notifications the user had already signed up for, but some notifications may be added. For example, anyone with a Gift Officer role will now have the Assigned Prospect Birthday Reminder notification enabled. This will bring their notification settings more in line with how they would have started out as a new user. Users can change their notification settings any time by clicking the gear icon in the Notifications section of the Drawer.

New location for Notification Settings

Previously, users managed their notification settings in the Notifications section of Control Panel. Now, users can access their settings more quickly and easily from the Notifications section of the Drawer. Users can simply click on the gear icon in the upper right corner of the drawer to access their notification settings. From there, users can also access the Add/Remove Subscribers section, where they can subscribe other users at their institution to notifications.

Activity Center users only: Touch Points are moving to the Notifications section

For users with Activity Center seats who have access to the Activity Center section of the Drawer, there are some changes to how Touch Points will display going forward. Previously, Touch Points displayed within the Activity Center section of the Drawer along with Contact Reports, Tasks, and Proposals. Now, Touch Points will display in the Notifications section of the Drawer. The Activity Center section of the drawer will be more focused on the Contact Reports, Tasks, and Proposals that are coming up or are overdue. Touch Points will continue to display within the full calendar view, which can be accessed by clicking the Calendar button within the Activity Center section of the Drawer.