



DONORSEARCH

DonorSearch 360io
Winter 2024 version 3.14
Release Notes



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Winter 2024 Version 3.14

Release Notes - Salesforce AppExchange Package Update

DonorSearch is excited to announce a major release - Winter 2024 Version 3.14 - with new features, enhancements and improvements. Below are the details of the updates and changes included in this release.

New Features and Enhancements:

1. Processing Records Limit:

- **Enhancement:** The DonorSearch 360io app has a records processing limit of 50,000 records. Users will now be prevented from processing records if the total record count exceeds 50,000. A prompt will appear to advise users to split the records into separate Campaigns for better performance.

2. Improved Processing Confirmation:

- **Feature Update:** When users select "Confirm and Process," a success message will confirm that the trigger has been initiated. An email notification will be sent once the process is complete.
- **Navigation Improvement:** After closing the confirmation, users will be automatically redirected back to the originating Campaign.

User Interface and Component Updates:

1. View DS Profile:

- **Label Update:** The button previously labeled "View New DS Profile" button has been replaced with a new button "View DS Profile." ***Users of the 360io application that had the previous button on their page layout will need to replace the old button with the new button.***
- **LEX Component Conversion:** This feature has been converted to a Lightning Experience (LEX) component.
- **Behavior Update:** The LEX Component will now open the DonorSearch profile in a new browser window. A URL link will be provided in case the pop-up is blocked.
- **Error Handling:** In the event of a failure, a pop-up message will display the error details.

2. Retrieve DS Profile:

- **LEX Component Conversion:** The "Retrieve DS Profile" button has been converted to a Lightning Experience (LEX) component.
 - **Important Note:** ***Users of the 360io application that had the previous button on their page layout will need to replace the old button with the new button.***
- **Navigation Update:** After profile creation, the user will be taken directly to the DonorSearch record.
- **Error Handling:** In the event of a failure, a pop-up message will provide the error details.

Background Batch Processing:

1. DS360oi__Background_Batch_Flag__c Update:

- **Behavior Adjustment:** This setting now checks the `DS360oi__Background_Batch_Flag__c` only for new Contacts created after the feature is enabled, as well as for any new records manually checked.
- **Scheduled Job Confirmation:** After the scheduled job runs, the flag will automatically be unchecked for processed records.

Additional Enhancements:

1. Apex Class Update for DSAi Scores:

- **Enhancement:** The Apex class responsible for retrieving DSAi scores has been updated to automatically retrieve all associated scores, ensuring comprehensive data collection.
1. From Settings, go to the General Settings tab
 2. Click Edit and scroll down to the 'AI-Generated Scores' section
 3. Select a AI Batch Refresh Cadence
 - a. If 'Bi-Weekly' or 'Monthly' is selected, no further action is needed after saving the settings.
 - b. If 'Custom' is selected, after saving, go to Salesforce Setup and navigate to the Apex Classes page
 - c. Select Schedule Apex
 - i. Provide a Job Name (make it something universally understood by all admins)
 - ii. Paste 'ScheduleBatchFetchDSAI Scores' into the Apex Class field. As a best practice, use the magnifying glass to confirm the value
 - iii. Leave Schedule Using as 'Schedule Builder'
 - iv. Choose a Frequency that applies to your org and the refresh rate of your AI scores. This includes setting a Start and End date, along with a Preferred Start Time
 - v. Save. We recommend you monitor the first scheduled run to confirm it ran successfully from the Apex Jobs page in Setup

2. DonorSearch Record Layout Improvement:

- **UI Update:** The DonorSearch Record Layout has been modified to display DSAi scores in a more structured manner, enhancing readability and organization.

3. New Fields in DonorSearch Related List:

- **Field Additions:** Two new fields, "ACQ Score" (Acquisition Score) and "ACQ Rank" (Acquisition Rank), have been added to the DonorSearch Related list under the DonorSearch AI section for more detailed insights.