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## MyBernard Roadmap

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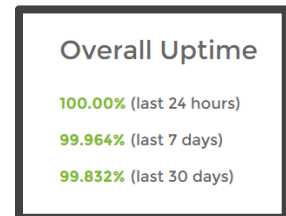
During 2016, enhancements were made to MyBernard to include new functionality and several changes requested by clients.

- Launch of Mobile Web App
- New Event Module
- New Major Donor Module
- New Membership Module
- Integration with WealthEngine

Bernard invested in infrastructure changes at no cost to clients including the addition of load balancing, improving firewall security, and maintaining PCI compliance to improve processes and reduce down time.

For a real-time view of Bernard Uptime Statistics, please visit [www.bernardsolutions.com/status](http://www.bernardsolutions.com/status).

We have made these and other statistics available to you so you can check the status of MyBernard and Rapid Entry at any time.



### Next Release

The November 2016 release of enhancements and new functionality includes these items:

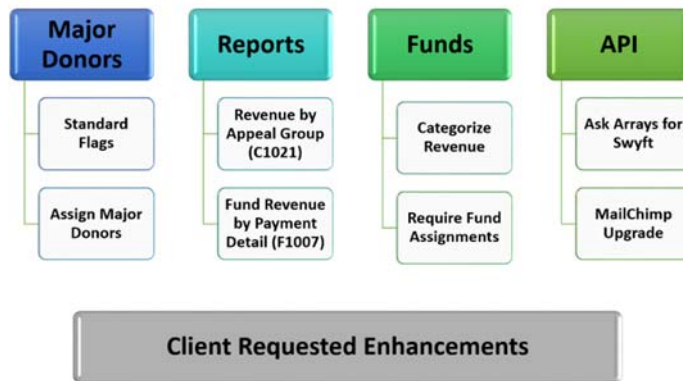
### Notes

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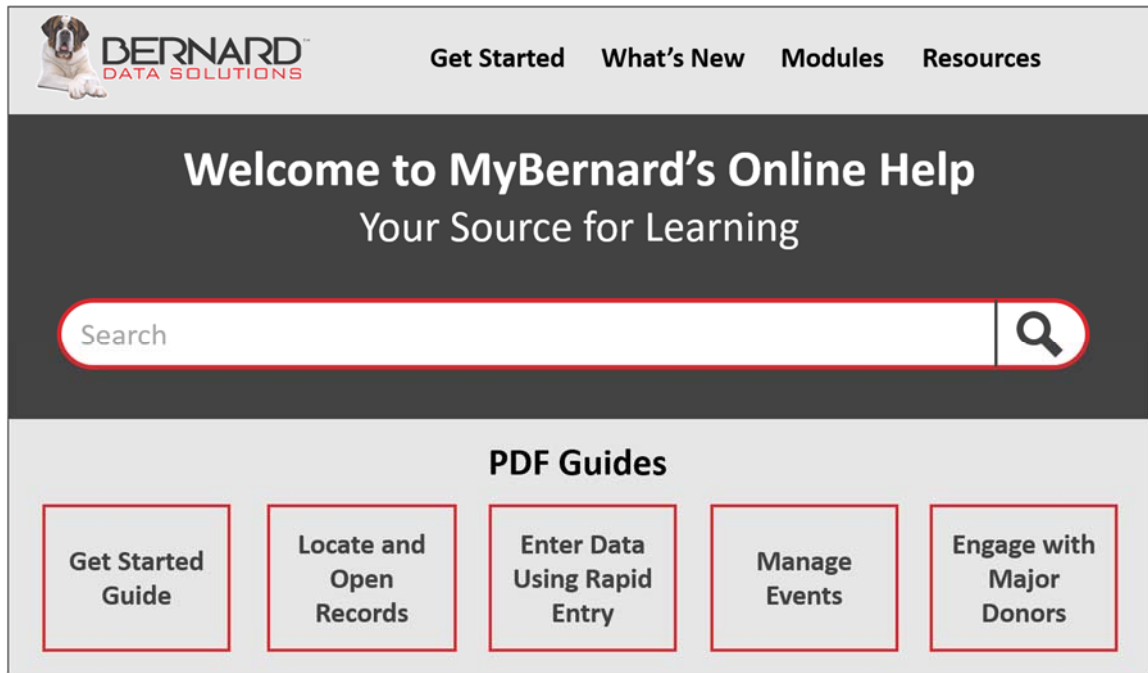
## Future Enhancements

Throughout 2017 and beyond, Bernard Data Solutions will release new functionality and further enhancements in MyBernard. Some of the functionality you can expect to see in the future includes:

Enhancements and New Functionality	
Data Management and Reporting	
Email	
Events	
Geofencing	
Matching Gifts	
Mobile Web App	
Partner Portal	
Peer to Peer	
Rapid Entry Web	

## MyBernard Online Help

In 2017, a new look and updated content for the MyBernard help files will be released so users can easily search for and locate information about using the product. Instead of the look and feel of legacy help files with outdated content, the new solution looks more like a website utilizing top navigation and Google search functionality.



With top navigation, you can move your mouse to the menu and select from options available on the sub-menu. Once you click an option, all content related to that topic displays on the page.

The new search feature works like Google when you enter keywords and then search the files. All the content related to the criteria used for your search will display with a brief description of the topic.

The PDF guides are formatted like the handout you have used throughout the forum. You can click on the guide you need to download a PDF version to your computer and print it for quick reference. The Get Started Guide is designed for new MyBernard users because it provides the basics for working with MyBernard.

### Notes

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## Upcoming Training Sessions

After the forum, you are invited to continue learning with us by participating in training webinars. These post-forum training sessions build on the content discussed during the Client Forum. Please save the date and watch for details and registration information in your inbox:

Title	Date
<b>Working with MailChimp for Digital Communications</b>	11/29/2016
<b>Building Online Donation Pages with SWIFT Capture</b>	12/13/2016
<b>Segmenting Donors in MyBernard</b>	TBD – Q1/2017
<b>Generating Reports in MyBernard</b>	TBD – Q1/2017
<b>Using MyBernard to Manage Inventory</b>	TBD – Q1/2017

New MyBernard users can participate in webinars where they learn the product and practice their skills in a training environment without impacting your production data. These online sessions provide participants with an opportunity to interact with an instructor who can answer questions and provide best practice information on these topics.

- Navigation Basics
- Locating and Opening Records
- Entering Data Using Rapid Entry
- Building Queries (Basic)
- Generating Reports (Basic)

Look for email invites to register any new employees for these sessions in Q1 2017.