New Features Guide

New Features for Blackbaud Altru 2.95

Before you use the new **Blackbaud Altru** features released in November 2012, we recommend that you review the information in this guide. It will help you and any other **Altru** users in your organization get the most from the enhancements we introduced.

Administration

The following *Administration* enhancements are available in **Altru 2.95**. For more information about these features, see the *Administration Guide*.

Constituent Matching Settings

To make the options on the Constituent matching settings page easier to understand, we changed the order of the columns and renamed the actions in the **Action** column.

The same label and columns updates were made on the Add/edit batch template and the Add/edit import process screens for batches and templates that support constituent matching.

Also, on batch templates, you can now select **Use global settings** to use the settings defined on the Constituent matching settings page in *Administration*. If you select this option, matching settings on the template are updated automatically any time you update matching settings in *Administration*. To change the default settings, clear **Use global settings**, select **Check for records that match existing constituents**, and then adjust the thresholds.

Likewise, on import processes, you can now select **Use batch template settings** to use the percentages defined on the batch template selected for the import. If you select this option, matching settings on the import process are updated automatically any time you update matching settings on the associated batch template. To change the default settings, clear **Use batch template settings**, select **Check for records that match existing constituents**, and then adjust the thresholds.

Note: **Constituent matching** is available for only these batch types: constituent update, enhanced revenue, revenue, and revenue update.

Communications

The following *Communications* enhancements are available in **Altru 2.95**. For more information about these features, see the *Communications Guide*.

Acknowledgements and Reminders Enhancements

In this release, usability enhancements were made to the add and edit letters screens for acknowledgements and reminders to simplify the workflow. You can now manage all recipient, processing, delivery information, and letter content from the same screen on the Create your letters step of the process. Use the scroll bar to access the options on the screen.
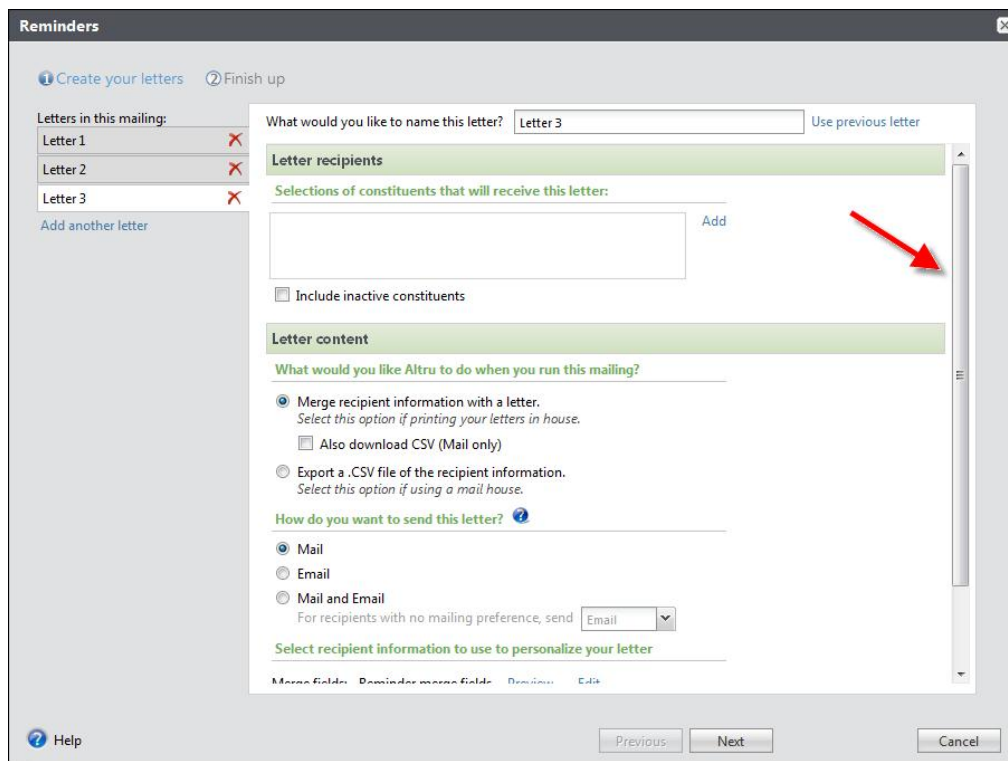
When you add or edit letters for acknowledgements and reminders processes, you can now select to run specific letters immediately after you save the process. On the Finish up step of the add or edit letters process, select the letters to run. When you click **Finish and close**, the appropriate output is generated for the selected letters.
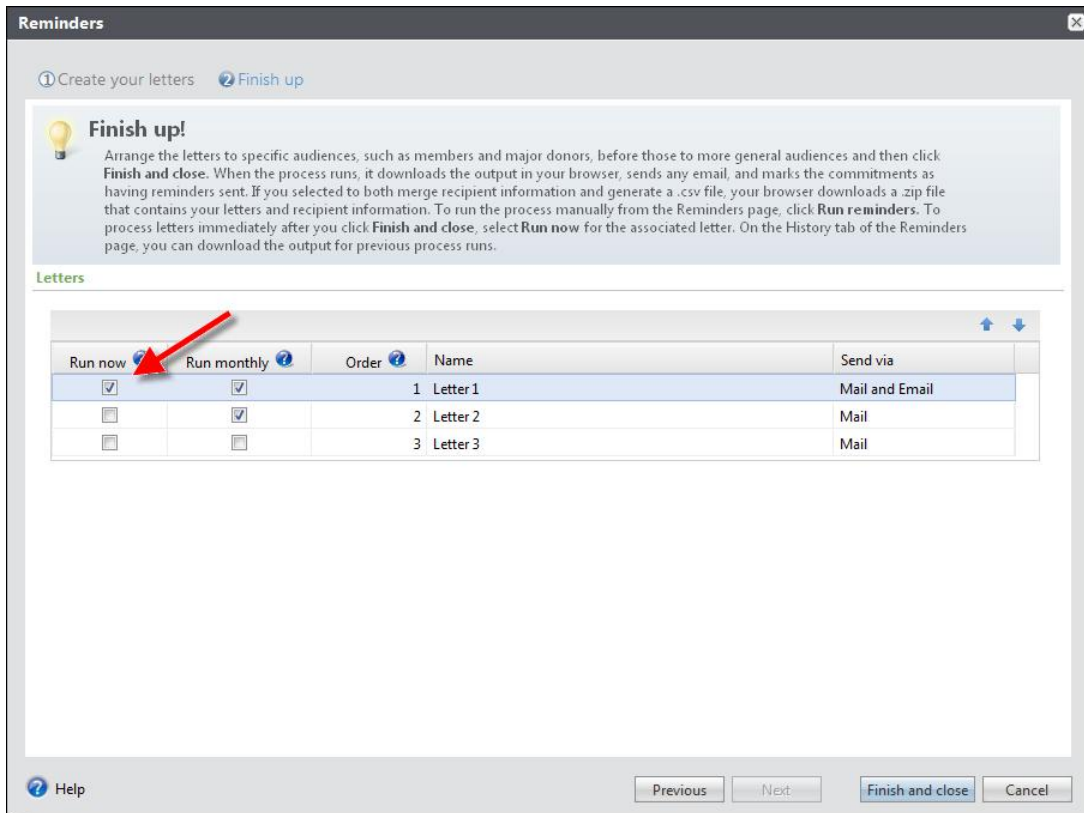
When you select the processing options for your acknowledgements and reminders, you can now select to process your letters manually, or run automatically on a daily, weekly, or monthly basis. This provides the flexibilty for organizations with multiple departments to process letters at different times, or account for seasonal or archvied letters that should be run separately.

To edit processing options, access the process page, and click **Edit** under **Processing options**.

The selections you make on the Edit options screen are reflected on the Finish up step of the add and edit letters screens. From here, you can edit which letters should run according to the schedule you selected on the Edit options screen.

When you run acknowledgements and reminders from the process page, the Run process screen now appears. From here, you can select which letters to generate when you run the process, and select to download a .CSV file of the results to create labels or envelopes. If your mailing contains email content, you can select to send emails immediately when you run the mailing, at a future date and time, or manually.

Appeal Mailing Enhancements

In this release, enhancements were made to the add and edit letters screens for appeal mailings. You can now manage all recipient, processing, delivery information, and letter content from the same screen on the Create your letters step of the process. Use the scroll bar to access the options on the screen.
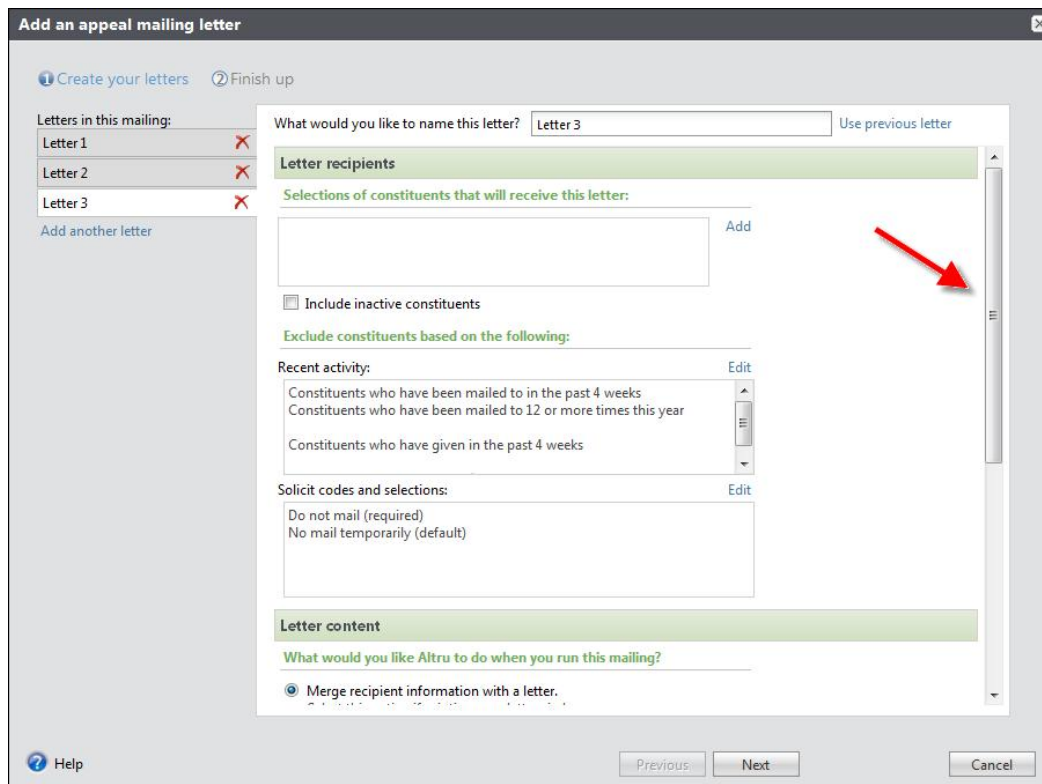
Constituent: Communications

From the Appeals tab, you previously clicked **Edit** and then selected **Constituent appeal** or **Responses**. Now, the dropdown menu is replaced by separate buttons for **Edit constituent appeal** and **Edit response**.

Constituents

The following *Constituents* enhancements are available in ***Altru 2.95***. For more information about these features, see the *Constituents Guide*.

Constituents: Quick Find

To quickly find a constituent's record, you can now enter a name or constituent lookup ID in the quick find field. Previously, you could only use names in the quick find search field.

Constituent Record: Relationships Tab

On a constituent record, the Relationship tab previously contained one button to add a relationship, and you selected whether you wanted to add an individual, organization, or group/household relationship. Now, the Relationship tab contains **Add individual**, **Add organization**, and **Add group/household** buttons you can use to add each type of relationship.

The tab now also shows the constituent's employment history. You can now edit a constituent's employment information from this tab. Previously, employment history was a separate tab.

Constituent Record: Personal Tab

On a constituent record, the Personal tab previously did not show the constituent's first, middle and last names. Now, the personal information section shows the constituent's first, middle and last names. To edit the constituent's name, click **Edit**.

Additionally, you can now edit name formats and aliases from the Personal tab. You previously used the Name tab.

Constituent Record: Organization Tab

On a constituent record, the Organization tab previously did not show the constituent's name. Now, the organization details section also shows the organization's name. To edit the name, click **Edit**.

Additionally, you can now edit name formats and aliases from the Organization tab. You previously used the Name tab.

Constituent Record: Contact Tab

On a constituent record, the Contact tab is now divided into **Addresses**, **Phone numbers**, and **Email addresses**. You can collapse and expand these lists. To learn more about an address, phone number or email address, expand its list. You can also click **Add** for each list to add new contact information.

Constituent Record: Documentation Tab

The default sort order for items listed on the Documentation tab is now by descending date.

Previously, you used the **Notification** menu to add, edit and delete notifications. Now, the dropdown menu is replaced by separate buttons. You can click **Add notification** to create a notification. If notifications already exist, **Edit notification** and **Delete notification** buttons also appear.

Constituent Record: Documentation Summary Tabs

The default sort order for items listed on all Documentation summary tabs is now by descending date.

Constituent Record: More Information--Interactions

The default sort order for items listed on the Interaction tab now is now by descending date. When interactions are sorted by date, they are no longer grouped.

Constituent Record: More Information--Communications and Appeals

From the Appeals tab, you previously clicked **Edit** and then selected **Constituent appeal** or **Responses**. Now, the dropdown menu is replaced by separate buttons for **Edit constituent appeal** and **Edit responses**.

Constituent Revenue History

Unearned revenue, now appears in the **Revenue type** column, on the Revenue History tab of the constituent record.

Also, if you click the link, the Revenue Transaction page appears with information about the payment.

Constituent Merge

We made several enhancements to the constituent merge process.

Merge Group Data

You can now retain group information when you merge constituent records. This includes inception date, type code, and name format function. To view these group data merge enhancements, select **Personal/organization information** on the Add constituent merge configuration screen.

In the new **Group details criteria** field, select whether to retain group details from the target, the source, or the group with the most recent inception date. You can select the checkbox below the field to prevent the merge process from overwriting group data when fields are blank.

Events

The following *Events* enhancements are available in *Altru 2.95*. For more information about these features, see the *Events Guide*.

Enhancements to the Events Page

On the Events page, a new **Capacity** column on the List tab displays the total capacity for events. You can click the column header to sort the list by capacity.

In addition, the **Category** and **Location** filters on the Events page now retain your filter selections the next time you log in. This makes it easier to view the event information that is most important to your organization.

Other enhancements have been made to the Events page, such as the ability to collapse and expand the calendar. You can also set up RSS feed alerts for newly added events and changes made to existing events.

Constituent: View as Event Registrant--Restrictions

From the Restrictions tab, to edit a constituent's event restrictions, including setting defaults such as Kosher or Vegetarian meals, you previously clicked **Edit** and then selected **Registration restrictions** or **Constituent default restrictions**. Now, the dropdown menu is replaced by separate buttons for **Edit registration restrictions** and **Edit constituent default restrictions**.

Fundraising

The following *Fundraising* enhancements are available in ***Altru 2.95***. For more information about these features, see the *Fundraising Guide*.

Fundraising Hierarchies

With this release, we made it easier to locate and mange your designations. The Fundraising Hierarchies grid now displays all the designations in the grid in an alpha-numeric order. You can search for a designation numerically and then alphabetically, while maintaining the hierarchy structure.

We also enhanced the designation filters and search functionality within the grid. Now you can you can enter any portion of a lookup ID, designation, or public name in the **Search for** field to return valid results. For example, if you enter "2012," any lookup ID, designation, or public name in your database containing the number "2012" appears in the search results. You can also sort the grid by designation, lookup ID, public designation name, and type.

On the Fundraising page, the **Fundraising hierarchies** link is now located under **Fundraising**.

Designation Search

With this release, we made it easier to search for designations by adding a link to the Designation Search form on the Fundraising page for quick access.

We also enhanced the designation search functionality. Now you can you can enter any portion of a lookup ID, designation, or public name to return valid results. For example, if you enter "Appeal," any lookup ID, designation, or public name in your database containing the word "Appeal" appears in the search results.

Note: You can still access the advanced search options by selecting **Show advanced search options**. When you expand those fields, you can use VSE category, Use code, Purpose type, Purpose category, Purpose site, and Report code 1 and Report Code 2 fields to narrow your search.

General Features

The following general features enhancements are available in *Altru 2.95*. For more information about these features, see the *General Features Guide*.

Shortcuts Added

To replace the **Favorites** functionality, we added the **Shortcuts** feature. This new feature creates shortcuts to pages and records that you access frequently. When you specify pages as shortcuts, you can quickly access them from the **Shortcuts** menu on the explorer bar.

In addition, you can organize, rename, delete, and email shortcuts.

Tabs and Headings

We changed the way tabs and headings appear on records and pages. Tabs are now visually delineated. Section headings on tabs are larger and green for increased visibility, and include an item count for each section.

We also added options to **Expand all** and **Collapse all** for tabs with more than one section heading. You can still use the arrows next to each section to expand or collapse just that section.
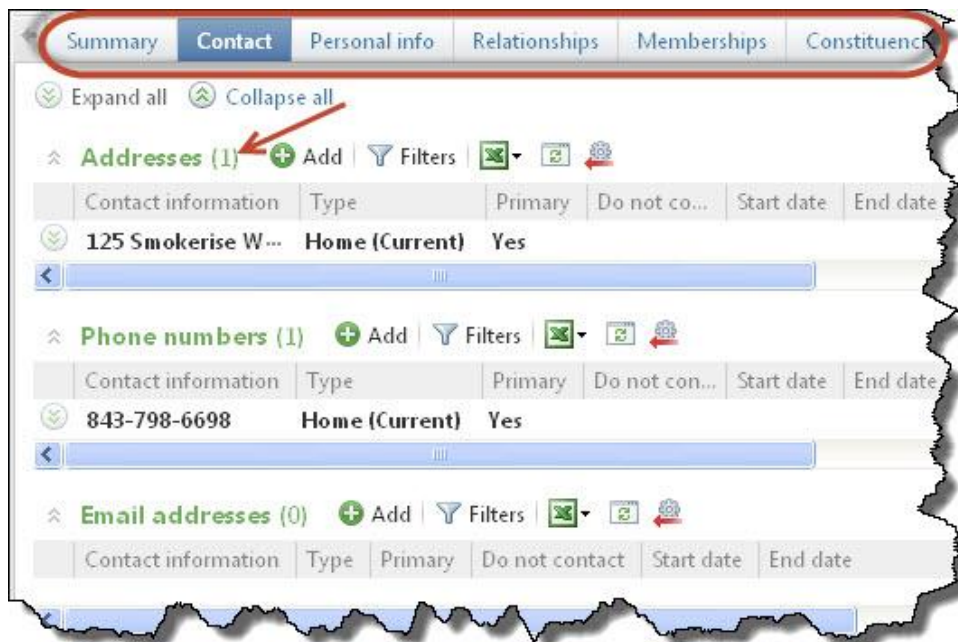
Organizational Calendar RSS Feeds

From the Organization calendar, you can now receive notifications as a Really Simple Syndication (RSS) feed through your browser or reader such as Microsoft Outlook. To receive RSS feed notifications, click **View RSS feed** on the Organization Calendar page. You can select to receive notifications when new events, program events, group sales, and calendar items are added.

General Ledger Setup

The following General Ledger mapping enhancements are available in *Altru 2.95*. For more information about these features, see the *Administration Guide*.

Segment Value Search

With this release we improved the segment mapping search functionality. When you map a segment or composite segment from the Define Segment Mappings page, a new search form lets you quickly browse for segment values. For example, when you map an individual segment, you can select the magnifying glass icon in the **Segment value** field to access the Segment Mapping Value Search appears.

To use this form, enter the **Segment value** field and select **Search**. You can then select the segment value from the results grid.

We also added a **Search for** field to the Map Segment and Map Composite Segment Values grids.
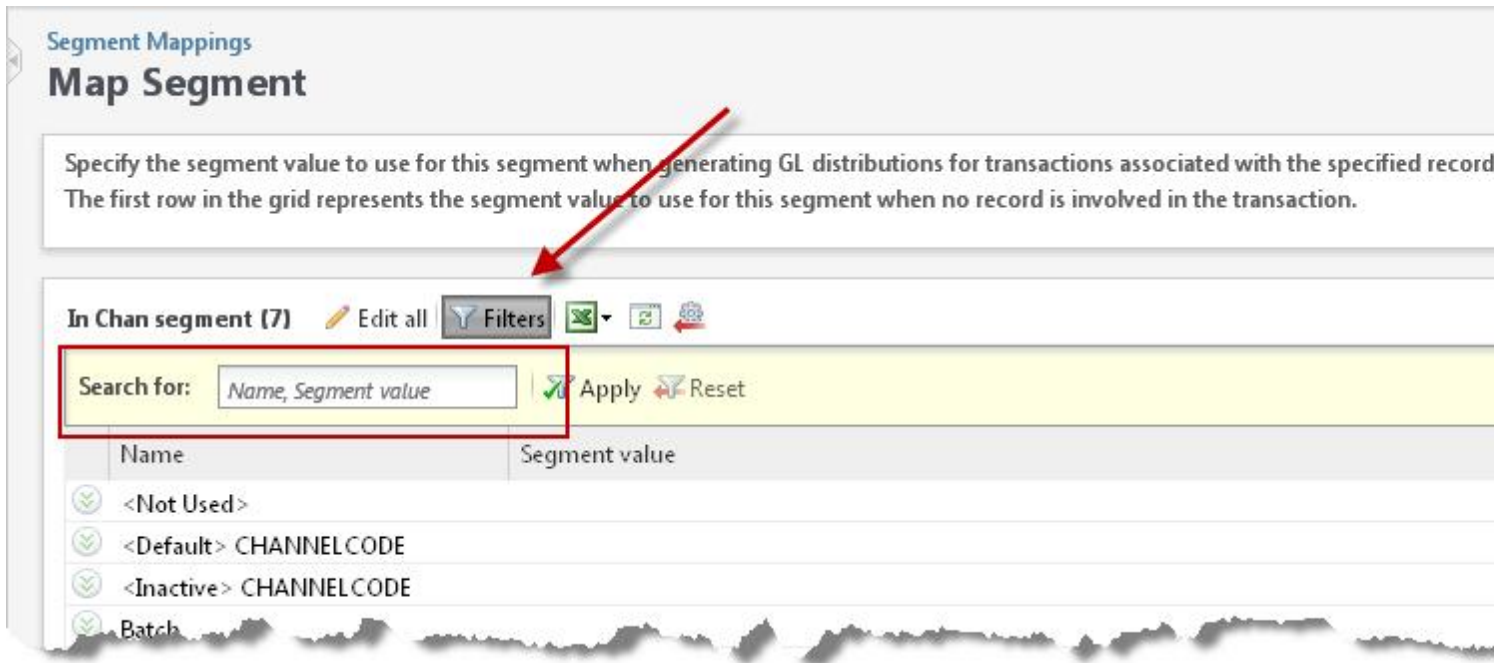
You can use this search to save time locating segments and composite segments you want to map. To access the **Search for** field, select **Filters** on the toolbar above the grid.

Unearned Revenue Transaction Mapping

To create appropriate GL distributions for liability payments associated with Group sales reservations or orders, you can now use "Unearned revenue" as a revenue type for Group sales ticketing office payments.

For example, when a group makes a payment for a reservation prior to check-in, the amount exists as "Unearned revenue" for GL distribution purposes. Or, when a group makes a payment for a reservation that is larger than the group reservation total amount, the overage amount exists as a "Unearned revenue" for GL distribution purposes. In both examples, distribution information displays on the GL Distributions tab of the payment record.

Continuing with the examples above, when the group checks in and makes an additional payment, the offsetting distribution information for the payment's "Unearned revenue" appears on the order record. The revenue type for the amount continues to exist as "Unearned revenue" even after check-in.

To generate GL distributions for Group sales ticketing office payments, you must first create mappings to GL accounts or account codes. To access the Transaction Mappings page, click **Define Transaction Mappings** on the General ledger setup page of an account system. To access the Ticketing Office page, click "Ticketing."

On the Payments tab, when you add or edit a transaction mapping and select to map revenue types, you can select "Unearned revenue" from the Revenue type screen. For more information about how to define transaction mappings and other General Ledger Setup tasks, see the *General Ledger Setup Guide*.

Warning: The program does not allow unmapped transactions to post. Therefore, if your organization plans to use the "Unearned revenue" transaction mapping, you must map the new revenue type prior to accepting payments for group sales.

Memberships

The following *Memberships* enhancements are available in ***Altru 2.95***. For more information about these features, see the *Memberships Guide*.

Constituent Membership Page Enhancements

We made several enhancements to the constituent membership page to bring additional information to your fingertips.

On a constituent membership page, you can now view add-ons associated with the membership. Add-ons now appear in their own section. By default, only current, active add-ons are displayed, but you can select to include expired add-ons.

On a constituent membership page, member constituencies now appear in the **Additional details** section. Previously, these were located in the **Primary member** section.

On a constituent membership page, membership cards now appear in their own section instead of in the **Benefits and sent items** section.

On a constituent membership page, you can now view a summary panel of the comments or notes associated with the membership revenue transaction, as well as comments associated with the membership details. From this panel, you can also edit the comments. Previously the membership revenue comments were accessed from the revenue transaction and the membership comments were accessed from the Edit membership details screen.

Mid-term Membership Upgrade

You can sell an upgrade to a membership during the membership, but prior to the renewal window. In order to be eligible for an upgrade, the membership must be changing from one level to a higher level, such as from Individual to Family, or from a shorter term to a longer term. You cannot upgrade a membership from one membership program to another.

If a membership is eligible to be upgraded, an **Upgrade now** button appears for the membership on the constituent's Memberships tab and on the constituent membership page. The only level and term options available are ones that change the membership to a higher level with same or longer term or to a longer term at the same level.

Membership Expiration Dates

We've updated the default expiration dates for memberships in a program to include a period of time in which the membership is extended and the expiration date is "pushed" to the next period.

To expire the memberships for the program on the same day and month every year, select **Is fixed** on the Renewals tab and enter the month and day in the **Expiration date** column. In the **Push to next period after** column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the **Expiration date** column. If you enter 09/01 in the **Push to next period after** column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.

Membership Card Format

For a membership program, the membership card format is no longer required.

Save Constituents in Membership Dues Batch

In the Membership Dues Batch, new constituents are now saved to the batch row. When the batch is committed, the new constituent records are actually created. Previously the constituents were created as they were entered.

Edit Membership ID

We have added the ability to edit the membership ID from the constituent membership page. To customize a membership ID for a constituent, on the constituent's membership page, click **Edit membership ID** under **Other tasks**. The Edit membership ID screen appears.

Memberships and Recurring Gifts

For recurring memberships, you can choose to create the recurring gift, but not make the first payment. However, you can still enter credit or debit card information. The token will be saved to use for future recurring gift payments for the membership.

Revenue

The following *Revenue* enhancements are available in ***Altru 2.95***. For more information about these features, see the *Revenue Guide*.

Pledge Receivables Report

Use the Pledge Receivables report to view the detail and total amount of your outstanding pledges. Only posted activity is included in this report. You can filter the report by constituent or designation, and include only pledges with specific characteristics, like the as-of post date. For each pledge, you can view its constituent and designation, pledge date, Lookup ID, and Revenue ID. You can also view information about any balance, payments, and write-offs associated with each pledge.

Note: The purpose of this report is to reflect the detail and total amount of your outstanding pledges. Therefore, this report includes only posted activity. If you have pledges in your system marked as "Do Not Post," they will not appear on the Pledge Receivables Report.

You can access the Pledge Receivables Report from the Financials page under **Reports**. For more information about the Pledge Receivables report, see the *Reports Guide*.

Edit Matching Gift Payments

You can now click **Edit matching gift payment** under **Tasks** on a payment record to edit matching gift payments. The new Edit matching gift payment screen makes it easier to correct errors made when the payment was originally entered by displaying lookup IDs, applied amounts, claim amounts, and other details. Previously, you could only edit matching gift claims on the Edit posted payment screen.

Revenue Record

On a revenue record, you can now click the node next to **Transaction summary** to quickly expand or collapse transaction summary information, including status and payment method details.

GL Distributions Tab

We made several enhancements to the GL Distributions tab on the revenue record for payments and orders.

- The GL Distributions tab displays a timeline that lists original payment transactions and subsequent activity associated with original transactions, such as adjustments. For example, if you adjust a payment twice, the timeline displays the original payment as well as the two adjustments. All transactions in the timeline are listed by post date.

  In the timeline, under **Transaction history by post date**, click **All dates** to view transaction activity for all dates associated with the original transaction. Or, you can click each transaction activity separately for a more specific view. Transaction activity that occurs on the same post date is listed separately in the timeline. Note that transactions with a status of "Do not post" are not included in the timeline.

- Colored arrows display beside each GL distribution row, indicating current and reversal distribution activity associated with a transaction. Green signifies current GL distributions for a transaction; orange signifies GL distributions that have been reversed; and red signifies reversal GL distributions.

- We added the **View** filter to further specify the types of distributions you want to view on the tab.

- To promote a more streamlined interface, we removed the traditional grids that previously separated each distribution type. Now, distribution types are listed in a more unified way, separated by headers that reflect the distribution's application type. We also removed the term "GL distributions" from each distribution type header. For example, "Sold stock GL distribution" now appears as "Sold stock."

- If an alias exists for a transaction, the alias displays in the **Account** column (instead of the account number). The account alias associates the account number in the system with the account number in your third party general ledger system. For more information about the account alias, see the *General Ledger Setup Guide*.

- If a transaction was entered using an enhanced revenue batch, the batch number associated with the transaction displays in the **Batch number** column.

- The **Mapping type** column displays the type of revenue transaction, such as Gift – Stock.

- For sold stock distribution headers, the transaction date and amount display.

- Previously, reversal transactions were listed in a separate grid. With this release, reversal activity now displays under the distribution header of the original transaction. For example, when you edit a posted donation, the

Donation distribution header appears and lists current distributions as well as reversal distributions. "Reversal" displays under the **Reference** column.

• To edit a distribution, you now click **Edit** next to a distribution header. Previously, **Edit distribution** displayed in the grid that separated each distribution type.

• To help ensure transactional integrity, we changed the way you can edit distribution information from the GL Distributions tab. For payment transactions (such as original payments) and order transactions (such as discounts), you cannot edit the **Transaction type** or **Amount** information on the Adjust and Edit GL distribution screens. Only the **Account** and **Reference** fields are editable. You can, however, edit the transaction type or amount information from the transaction record.

GL Distributions and Refunds

You can now edit unposted **Refund** GL distributions for order transactions. To edit GL distributions for order refunds, from the Refunds tab of an order transaction, click the refund. On the refund page that appears, click the GL Distributions tab. On the action bar of the refund distribution, click **Edit distribution**. Note that **Refund** GL distributions for order transactions do not display using the new GL distribution timeline.

When you refund a benefit associated with an order, the reversal GL distributions are included on the GL Distributions tab of the order and are displayed using the new GL distribution timeline.

Transaction Search

You can now search for transactions with the revenue type of unearned revenue. Unearned revenue is a new revenue type added this release to account for prepayments and overpayments made prior to when a reservation is checked-in. To search of unearned revenue transactions, from *Revenue*, click **Transaction search**. Select **Unearned revenue** from the **Revenue type** drop-down.

Revenue Transaction Details

From the Details tab of the **Revenue Transaction** page, now, for all payments made through a sales order method such as Advance sales or Daily sales, only the link to the sales order record appears.

Sales

The following *Sales* enhancements are available in ***Altru 2.95***. For more information about these features, see the *Sales Guide*.

New Revenue Type

A new revenue type of Unearned Revenue was added. It was added to support the creation of appropriate GL distributions for prepayments and overpayments associated with reservations.

Payments toward group sales reservations that have not been checked-in have been changed to the new revenue type, Unearned Revenue. However, no other account information has been changed. Mapping types for payments toward group sales reservations that have been checked-in have not been changed.

Note: Your current Admission account mapping has not been changed, but Unearned Revenue has been added to any Ticketing Payment mappings that contained Admission mappings.

Location Availability Report

With the new Location Availability report, you can check the availability of locations for program events and special fundraising events during a specific time period. When you check the availability, you can view locations that are either available or unavailable for the date or date range entered.

To view the Location Availability report from *Sales*, click **Location availability** under **Reports**. From *Events*, click **Locations** and then click **Location availability** under **Reports** on the Locations page.

Scheduled Event Ticket Detail Report

On the Scheduled Event Ticket Detail report, you now have the ability to sort by last name. This is now the default sort option. Prior to this release, you could only sort by full name, which was ordered by first name, last name.

Volunteers

The following *Volunteers* enhancements are available in *Altru 2.95*. For more information about these features, see the *Volunteers Guide*.

Volunteer Schedule Report

The Volunteer Schedule Report is now sorted so that the most recent date is at the top. Jobs with the same date are now sorted by start time.

To view this report, go to *Volunteers* and click **Volunteer schedule**.

Web

The following *Web* enhancements are most relevant to people who configure and manage your web forms. Users who work in this area are usually assigned the Web Forms Administrator system role. For more information about these features, see the *Web Forms Guide*.

Add-ons for Membership Forms

On your membership web forms, you can now include member add-ons to allow website users to pay for additional members when they purchase memberships online. When you edit a membership form, a new **Add-ons** section displays any member add-ons that are available for the membership program so that you can include them on the membership form.

Note: Only add-ons with the "Additional member" type are currently available for membership forms. Add-ons with the "Benefit" type will be available in a future release.

When you include an add-on on the form for a membership program, it is automatically included on the corresponding membership renewal form so that website users can purchase it with renewals as well as new memberships.

Tip: Keep in mind that if you plan to discount tickets for a membership program or level, you should set the ticket limit on the discount high enough to include both members and any potential add-on members. If the combined number of members and add-on members exceeds the ticket limit, not all members will receive their ticket discounts. For more information about discounts, see the *Tickets Guide*.

Email Alerts for Online Sales

With the new **Email alerts for online sales** configuration task, you can now set up set up email alerts in *Web* or *Sales* to notify you when website users submit orders on your web forms.

Email alerts allow you to track web form activity and access registrant information and sales order information outside of the program. For example, you can use alerts to monitor how quickly events fill up so that you can adjust capacity or resources as necessary, or you can use them as prompts to follow up with registrants, major donors, or other website users who submit web forms. After online transactions, you receive email with details about the sales order.
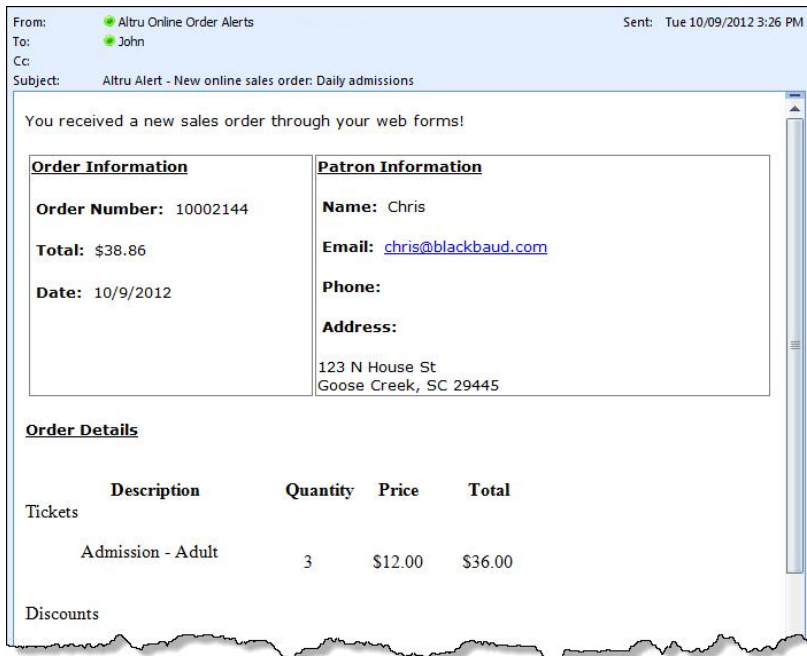
To set up email alerts, go to *Web* or *Sales* and click **Email alerts for online sales** under **Configuration**. The Email alerts for online sales screen appears.
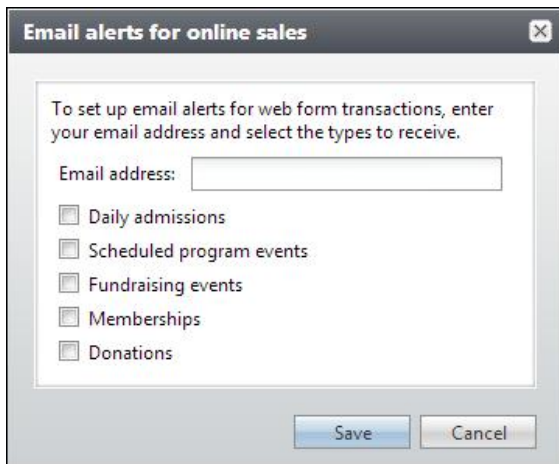
On this screen, you can enter an email address and select the types of transactions to receive alerts for. Application users can set up alerts for one email address per user, and they cannot set up alerts for email addresses that already receive alerts.

After you set up email alerts, you can use the new **Email alerts management** configuration task in *Web* to manage them. On the Email alerts management page, you can view the email addresses that receive email alerts and the types of alerts they receive. To remove alerts for email addresses, you can delete them from the list. For example, when employees leave your organization, you can remove alerts for their email addresses.

Secure Payment Page

To securely accept and process online credit card transactions such as donations and membership dues, your web forms use a secure payment page. This page now uses HTML5-based functionality and media queries to ensure an optimal experience on mobile-optimized websites and devices of various screen sizes.