Parts Guide

04/28/2015 Blackbaud Internet Solutions 4.0 Parts US

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In *Parts*, you can create, edit, and delete content for your website. For example, to include your organization's mission statement on your site, you can create a part in *Parts* and write the statement. You can also include your organization's logo in the part. Other examples of parts include navigation buttons, profile forms, event registration forms, and frames. After you save a part, you can display it on multiple web pages. This section describes how to create parts for your website.

Note: Content does not appear on the website until you add the part to a web page in *Pages & templates*. For information, see the *Website Design Guide*.

Create and Edit Parts

When you include a part on multiple web pages, you can edit and update it once for all pages. To ensure a new part's appearance, such as font size and style, is consistent with the rest of your website, you can copy an

existing part. This retains the bulk of information required to create content.

The procedures in this section describe the tabs you use to create and edit parts. For information about how to design a specific part, see the section about that part type.

Create a part

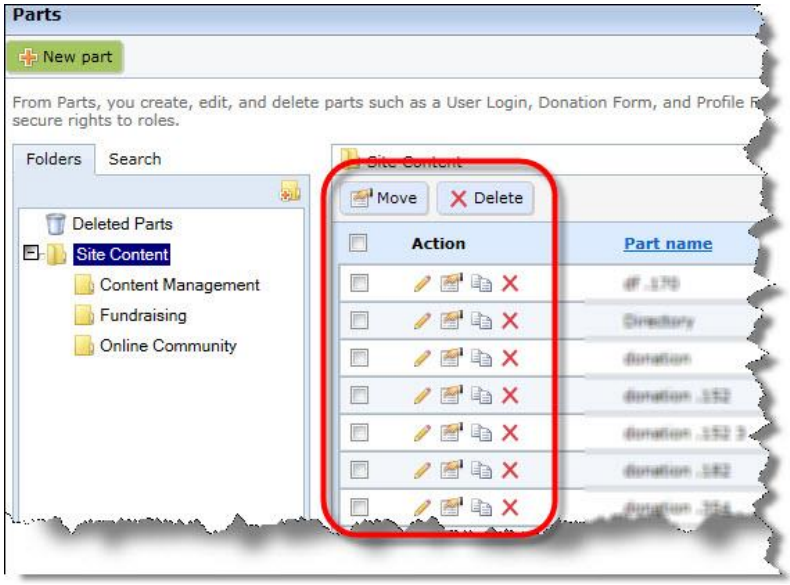
When you host multiple sites, you can create parts for individual sites. To do this, log in to the site and create the part. For more information, see the *Administration Guide*.

1. From *Site explorer*, click **Parts**. *Parts* appears.
2. Click **New part**. The New Part screen appears.
3. On the Properties tab, enter basic information that defines the part. For example, select the part type and enter a name for the part. For more information, see Properties Tab on page 5.
4. Select the Targeting & Security tab. In the grid, assign view, edit, delete, and change security rights for users and roles. For more information, see Targeting & Security Tab on page 7.
5. Click **Next**. The Design tab appears. For more information about the Design tab, see Design Tab on page 7. For information about how to design a specific part, see the section for that part type.
6. Click **Save**. You return to *Parts*.

Edit a part

To search for an existing part to edit in *Parts*, use the filter tools. For example, select a part type in the **Filter by Type** field or enter a full or partial name in the **Filter by Name** field.

1. From *Site explorer*, click **Parts**. *Parts* appears.



2. When you edit parts, you can perform the following actions:
   - To edit a part's design, click **Click here to edit this part**. The Edit Part screen appears on the Design tab. For information about how to design a specific part, see the section for that part type. For information about the Design tab, see Design Tab on page 7.

- To edit a part's properties, click **Click here to view/edit this part's properties** under **Action**. The Edit Part screen appears on the Properties tab. For information about part properties, see Properties Tab on page 5.
- To create a part based on an existing part, click **Click here to copy this part** under **Action**. The Copy Part screen appears. In the **New Part name** field, enter a new name and click **Next**. The Edit Part screen appears so you can edit the new part.

Note: If the original part contains tags, the copy inherits the tags. From the Tags tab, you can modify the copied tags.

- To move a part to another folder, select the checkbox beside the part and click **Move**. The Move selected items screen appears for you to select a different folder.
- To delete a part, select the checkbox beside the part and click **Delete**. A message appears to confirm you want to delete the data. When you do this, the part is available for you to restore from the Deleted Parts folder.

Warning: To prevent you from inadvertently removing active content from your website, you can no longer delete parts when they are associated with web pages. When you attempt to delete a part that is associated with a single site, or shared across multiple sites, a message appears to inform you that you cannot remove it because it exists on a page. To identify the pages where the part appears, select the part's Usage tab. For information about the Usage tab, refer to **Usage Tab on page 12**.

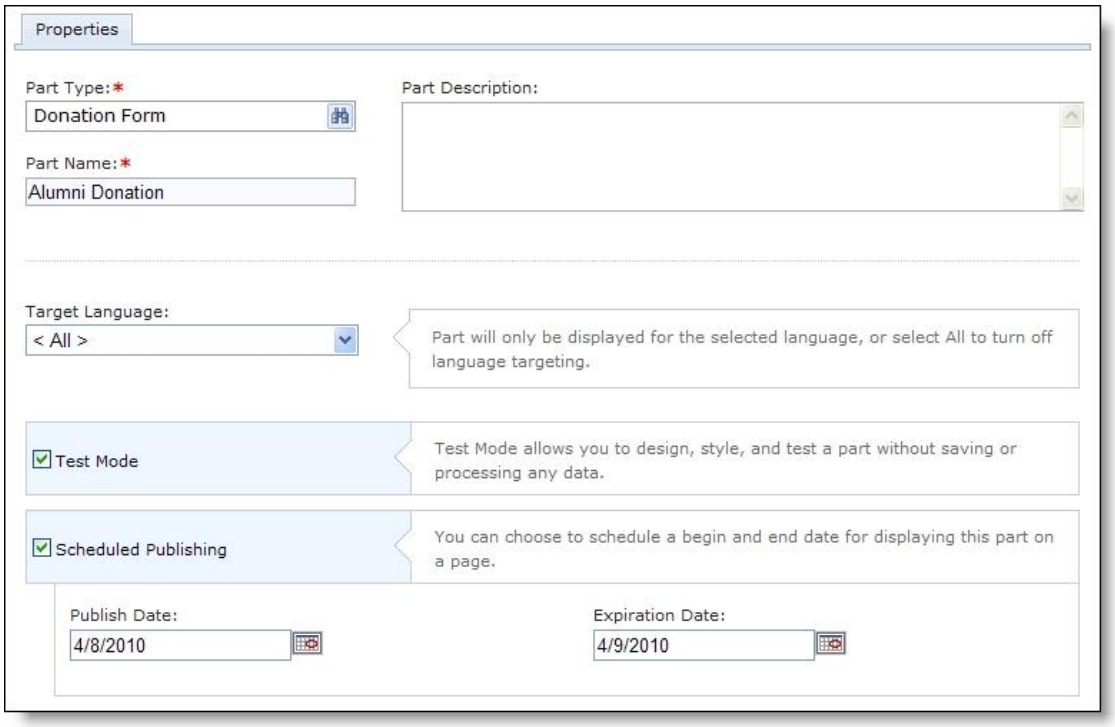
3. Click **Save**. You return to *Parts*.

Properties Tab

On the Properties tab, you enter basic information that defines the part.

Define part properties

1. Select the Properties tab of a part.



2. In the **Part Type** field, select a part type, such as "Formatted Text and Images." This is the type of content to include on the web page. After you save the part, you cannot change the part type.

   After you save a part, you can view its ID in the **Part ID** field. You can use this ID to identify the part in a URL for a traffic measurement service, such as Google *Analytics*. For more information, see the *Administration Guide*.

3. In the **Part Name** field, enter a name such as "Mission Statement" to allow users to quickly identify the information in *Parts*. The name is for internal use and does not appear on the website.

4. In the **Part Description** field, enter any additional information to identify the part.

5. In the **Target Language** field, select a language for content in the part. If the website user's primary language for the Internet browser is selected to the same language in the field, the part appears on the web page. If the browser is selected to a different language, the part does not appear. If the part applies to all languages, leave the default "<All>" in the field.

   The languages that appear in the drop down are those selected in the **Language** box on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*.

6. To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or Blackbaud CRM, select **Test Mode**. For example, you can complete the fields on a donation form to ensure the confirmation page is styled and working properly. Although you submit the donation and receive a confirmation, a transaction does not appear on the Web Transactions page.

   The **Test Mode** checkbox appears on the Payment, Donation Form, and Event Registration Form parts. Only users with supervisor rights can view parts in Test mode.

Note: Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts.

7. To make the part available within a certain time frame, select **Scheduled Publishing**. When you select this checkbox, the date fields are enabled.

Note: If you do not select **Scheduled Publishing**, no time limits exists for the part.

   a. In the **Publish Date** field, enter the date and time the part first becomes available on your site.

   b. In the **Expiration Date** field, enter the date and time the part becomes unavailable on your site.

      If an expired part exists on a live web page on your site, the part does not appear. The other parts on the page dynamically fill the space where the expired part previously appeared.

Note: When you host multiple sites and edit part properties, the **Assign to site** field appears so you can move a part from its current site to another site. If the part is in use on a web page on the source site, it continues to appear on that site. However, the part is now associated with the target site and its security. When you move a part, some parts require you to configure options again when you edit the part's design after the move. For example, the eCards part requires you to select an eCard template before you save it. During this time, there are no disruptions to the part on your site. It maintains the original configuration until you edit the part.

8. If you plan to use the part on a site that is a template for multiple sites, you can create a single instance of the part when you copy the site so you only have to make changes to one instance. To create a single instance, select **Share part across sites**. To limit the users who can edit the shared content, assign security rights from the Targeting & Security tab. For information about how to copy a site, see the *Administration Guide*. For information about the Targeting & Security tab, see Targeting & Security Tab on page 7.

Note: This option appears for the Formatted Text and Images, Slideshow, and Unformatted Text parts.

   When you select **Share part across sites**, the **Allow users who do not have permission to edit content to create a local copy** checkbox appears. If you select this checkbox, users without permission to edit shared content can copy it.

9. Click **Next**. The Design tab appears. For more information about the Design tab, see Design Tab on page 7. For more information about how to design a specific part, see the section for that part type.

Design Tab

The Design tab appears after you save a part's properties. On this tab, you set parameters defining the part's content, appearance, and processing. For example, on some parts you define required fields, allowable payment options, and how users navigate away from the part. For more information about the Design tab for a particular part, see the section for that part type.

Targeting & Security Tab

On the Targeting & security tab, you assign website security rights for users and roles. You can assign view, edit, delete, and change security rights.

By setting view rights, you target website content to only certain users. For example, on a Formatted Text and Images part, you can assign view rights to the Board Members role so only users in that role view the part on a web page.

Users with rights to edit and delete content can help manage the website. For example, on an Event Registration Form part, users with edit rights can update last year's golf tournament information with this year's information.

Users with change security rights have view, edit, and delete rights to the content. They can also change security on this tab. Only users with supervisor rights should have rights to change security.

Select website security permissions

Follow this procedure for information about the Targeting & security tab on pages, templates, images, and other areas in the program.

1. On a part, select the Targeting & security tab. A grid appears that lists the Everyone role in the first row.

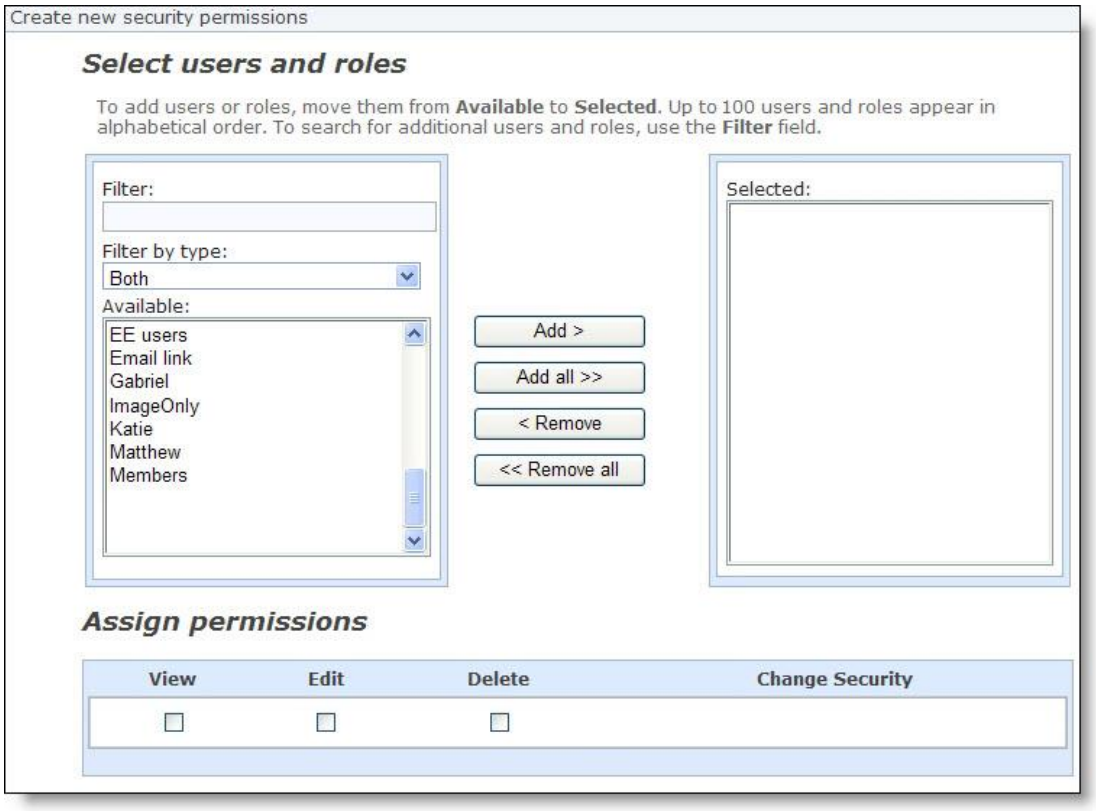
Note: You cannot edit a checkbox that you select for the Everyone role. All users inherit permissions from the Everyone role.

2. To apply the same security permissions another part uses, click **Copy permissions**. The Select a Part screen appears to select the part.

   When you copy permissions, you overwrite the current security settings on the Targeting & Security tab.

Tip: You cannot copy permissions from a different task. For example, when you select to copy permissions from a part, you must select permissions from another part. You cannot select permissions from a page or template. In addition, images do not support copying permissions.

3. Select the part and click **Select** to return to the Targeting & security tab. The users and roles appear in the grid. You can adjust the permissions as necessary.
4. To adjust the permissions for users and roles for this part, select **Add users and roles**. The Create new security permissions screen appears.



Tip: When you create or edit a User Login part, you select the roles to assign to a user who signs up on that part for your website. This is commonly the way users become a part of the roles you assign permissons for on this screen. For more information about role assignments on the User Login part, see User Login on page 180.

a. In the **Filter** field, enter the first letter of the user or role to include.

Note: The **Available** box displays 30 users and roles in alphabetical order. Use the **Filter** field to find additional users and roles that do not appear in the box.

b. Locate the user or role, and click **Add**. The user appears in the **Selected** box.

   To select multiple users or roles, press **SHIFT** while you select the multiple users, and then click **Add all**. The users appear in the **Selected** box.

c. Under **Assign permissions**, grant the users and roles view, edit, delete, and change security permissions.

d. Click **OK**. You return to the Targeting & security tab. The users and roles appear in the grid.

5. To apply the permissions to the part, click **Save**. You return to *Parts*.

For more information about security, see the *Users & Security Guide*.

Parts That Require User Login Information

Users must log in to view some parts on your website. The following parts require user name and password information before website users can access them.

- Change User ID/ Password
- Chapter Links

- Email Forwarding Form
- My Friends
- Profile Display
- Profile Form
- Targeted Content
- Transaction Manager
- User Interests Form
- User Link Module
- User Networking Manager
- User Photos Form

Other parts, such as the Personal Page Manager part, allow any user to access some of the part but require user name and password information to view the rest. Parts, such as the Menu and Weblog parts, do not require any login information.

Language Tab

Use the Language tab to rename labels, headings, and other text on your web pages. For example, if you do not want the anonymous gift checkbox to display **I prefer to make this donation anonymously** on the donation page, you can change the text to **Anonymous gift**. For the Tag Display part, you can enter the header that appears before the list of tags. You can also choose the punctuation mark, or delimiter, that separates entries in displays that include only tags on the selected page.

You can also enter localized text in another language for the items that appear on the Language tab. For example, you can create a Donation Form part for English and enter localized text for Spanish. On the Language tab, you enter the localized text for each language. You use this tab in combination with other features to create international pages for your website.

Rename and localize text

1. Select the Language tab of a part.

Tip: The Language tab appears on the Donation Form, eCards, Language Selector, Payment, Tag Display, Transaction Manager, User Email Preferences Form, and User Login parts.

2. In the **Category** field, select the area of the part to rename text for.
3. In the **Language** field, select the language to localize.

You select the languages that appear in the **Language** box on the Settings tab in *Sites & settings*.

4. Refer to the **Item name** column to enter text in the **Text** column. This text replaces the default text.
    - Enter the text to replace the default label or heading. For example, for the Anonymous gift checkbox item, you do not want the checkbox to display **I prefer to make this donation anonymously** on the web page. In the **Text** column, enter "Anonymous gift" to change the name of the checkbox.
    - Enter localized text for selected languages. For example, to create a Spanish web page, you can change the text to "Donación anónimo." In the **Language** field, select the next language to localize. When you toggle the **Language** field between multiple languages, the localized text appears in the **Text** column for each language.

      For more information about multiple languages on your website, see Add Localized Text For Web Pages on page 11.
    - For the Tag Display part, you can enter a new delimiter to separate tag entries.

Note: The delimiter separates entries in tag displays that show only tags for the parts on a page. For tag displays that include all tags in use, entries appear on separate lines by default and the delimiter does not appear. To add a delimiter to a tag display for all tags, you must modify the BBTagDelimiterAll element under Tag Display for the appropriate style sheet. For information about how to manage style elements, see the *Website Design Guide*.

Add Localized Text For Web Pages

You use the Language tab in combination with other features to create international pages for your website. You can create localized text for pages on your website in two ways. You can enter the localized text to appear on the Language tab and create the Language Selector part. The Language Selector part allows the website user to render the localized text on the web page. You can also create a part specifically for a language. If a website user's primary language for the Internet browser is the same as the part, the part appears on the web page.

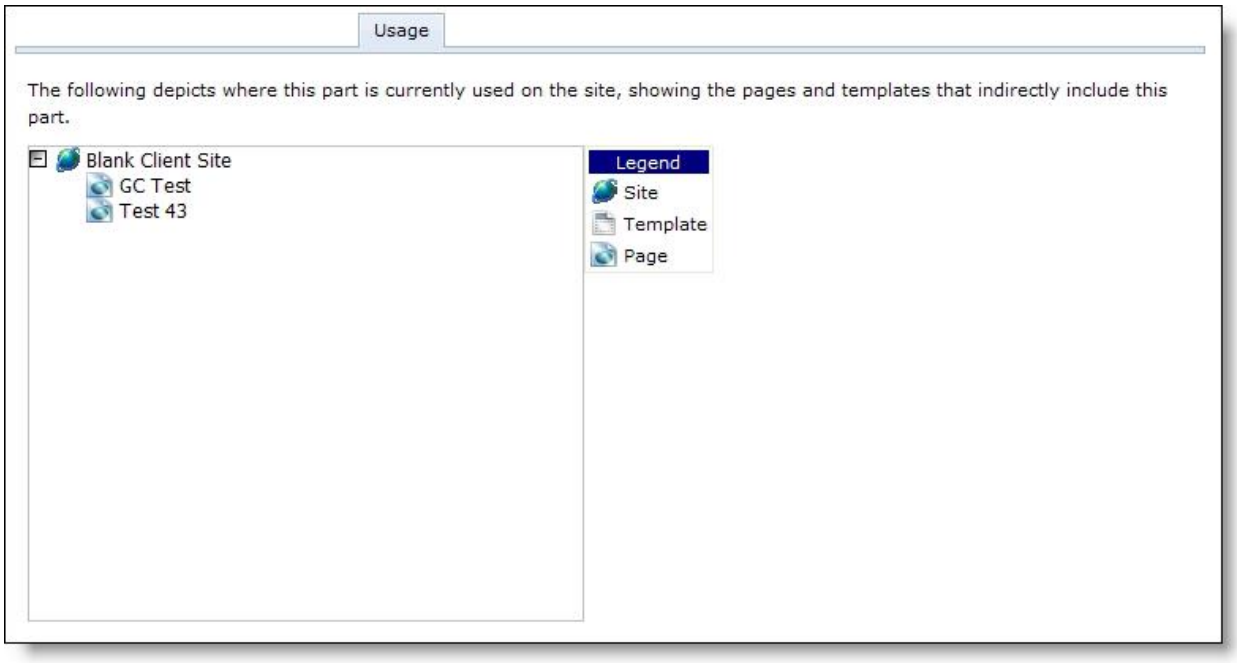
Implement multiple languages on your website

1. On the Settings tab in *Sites & settings*, select the languages to associate with your website. For example, if your website audience includes Spanish and French users, select **Español (Mexico)** and **français (Canada)** in the **Language** box. For more information, see the *Administration Guide*.
2. Create a part specifically for a language. You can create localized pages in two ways.
    - On the part's Properties tab, in the **Target language** field, select the language for the part. If the website user's primary language for the Internet browser is selected to the same language in the **Target language** field, the part appears on the web page. If the browser is selected to a different language, the part does not appear. If the part applies to all languages, leave the default "<All>" in the field. For more information, see Properties Tab on page 5.

      OR
    - On a part's Language tab, in the **Language** field, select the language to localize. In the **Text** column, enter the localized text for the web page. Create the Language Selector part. This part displays a **Language** drop down field on your website. A website user selects a language preference from the field on the web page. After the user selects the language, the page renders the localized text. For more information, see Language Tab on page 10 and Language Selector on page 72.
3. Add all applicable parts to a template or page in *Pages & templates*.

Usage Tab

After you save a part, the Usage tab appears. This tab displays the layouts, templates, and web pages that use the part. The information is for informational purposes only. If the part is not used, a “This part is not being used” message appears.



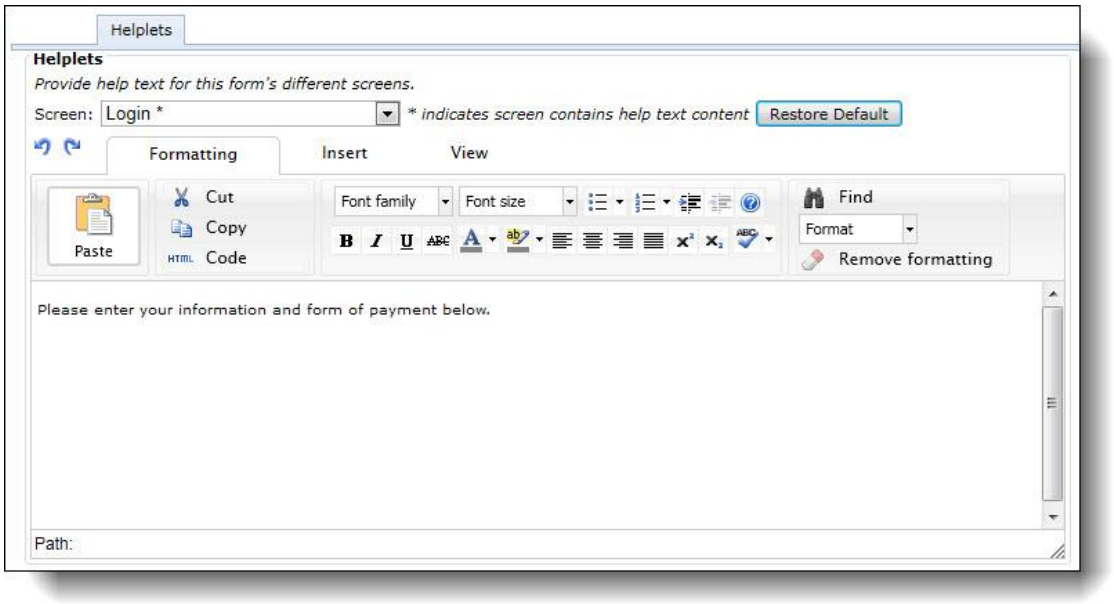
Helplets Tab

On the Helplets tab, you can add custom text to help users understand the features of certain parts on your website. For example, on the Personal Page Manager part, you can provide instructions for the various Dashboard buttons.

Tip: The Helplets tab appears on the Event Registration Form, Payment, and Personal Page Manager parts.

Add helplets

1. Select the Helplets tab.
2. In the **Screen** field, select the screen to add help text for.



Note: Some screens contain default helplet text. You can use the text provided or enter different text. If you overwrite the default text, you can click **Restore Default** to restore the original text.

3. In the box, enter the text to appear on the part. To format the content's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.
4. To create help text for another screen, select it in the **Screen** field. The program automatically saves your changes, and an asterisk appears beside the screens in the field that have help content.

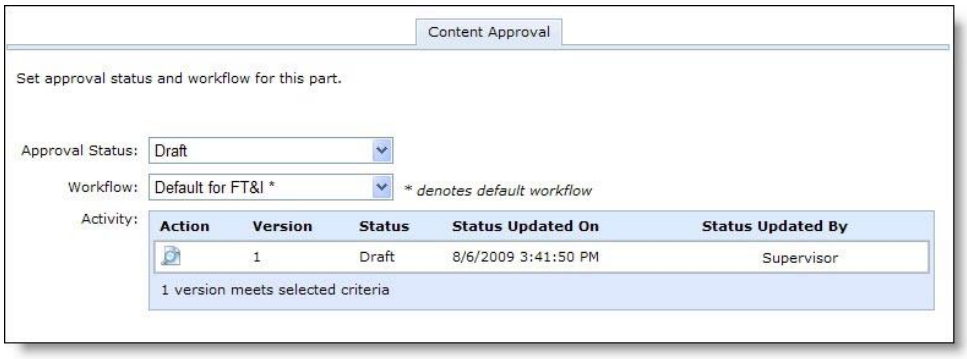
Content Approval Tab

When you design a Formatted Text and Images part or Formatted Text and Images (Secured) part, the Content Approval tab appears. On this tab, you select the approval status of the part and view its status within the selected workflow and its approval history. If you have rights to manage workflows, you can also assign the part to a different workflow.

When you revise a published part, the program automatically archives its earlier version. From the Content Approval tab, you can view its previously published versions. If you have rights to approve content, you can also restore the part to an earlier version.

Select the workflow and approval status of a part from its Content Approval tab

1. On the Edit Part screen, select the Content Approval tab.



2. In the **Approval Status** field, select the part's status in the workflow.
   - When you first create or edit a part, the approval status is "Draft" until you complete its design and submit it for approval. Until the part is ready for approval, select this account status. In the **Activity** grid, parts with this status display "Draft" in the **Status** column. Parts with this status appear in *Approvals* and on the Approvals tab of the selected workflow.
   - When you complete the part's design and content, select "Ready for Approval" to submit it for approval. Users in the approval role for the workflow can review parts with this status and select whether to approve the content to appear on the website. In the **Activity** grid, parts with this status display "Pending" in the **Status** column. In *Approvals* and on the Approvals tab of the selected workflow, parts with this status display an approval status of "Pending."
   - To approve the part and its content, users in the approval role for the workflow select "Publish." Parts with this status appear on your website. In the **Activity** grid, parts with this status display "Published" in the **Status** column.
   - To reject the part and its content, such as if the content contains error or is inappropriate for your website, users in the approval role for the workflow select "Reject."
3. If you have rights to manage workflows, the **Workflow** field appears. Select the workflow to apply to the part. The workflow determines the users who review the part for approval.

Note: When you create a workflow in *Workflows*, you can select whether it is the default workflow for the selected part type. When you design a part and select its workflow in the **Workflow** field, an asterisk (*) appears next to the default workflow. For information about how to create a workflow, see the *Administration Guide*.

4. In the **Activity** grid, view the recent approval activity for the part, including its approval status and the date and owner of the more recent approval status update.

   To view the part and its content, such as for review and approval, click **Click here to view this version** in the **Action** column. The part and its content appears. To return to the Content Approval tab, click **Close**.

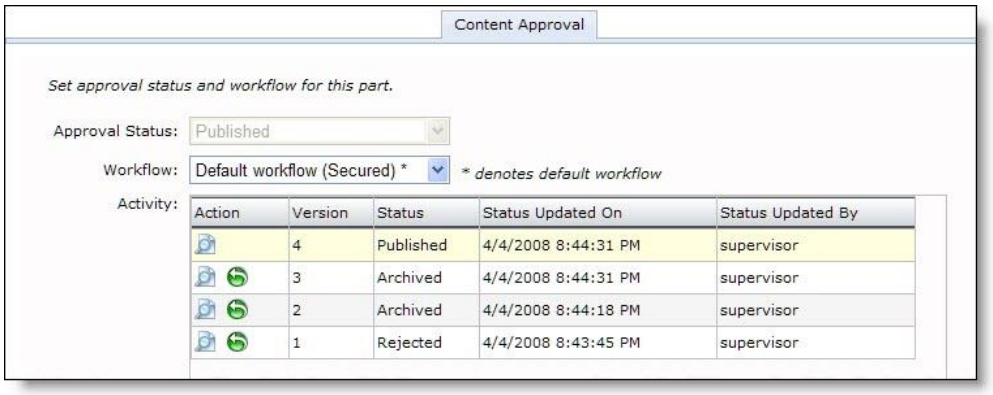
   To compose and send an email message to the most recent person to update the status of a draft or pending part, click **Click here to send email** in the **Action** column.
5. To continue to design the part and its content, select the Design tab. For information about how to design the Formatted Text and Images or Formatted Text and Images (Secured) part, see Formatted Text and Images on page 68.

   To return to *Parts*, click **Save**.

Restore a published part to an archived version

When you revise a published part, the program archives its earlier version. On the Content Approval tab, the **Status** column displays "Archived" for earlier published versions of the part. From the Content Approval tab, users in the content approval role can restore the part to an earlier archived version.

1. On the Edit Part screen, select the Content Approval tab.



2. In the grid, determine the version of the part to restore. To view the part and its content for an earlier version, click **Click here to view this version** under **Action**. The part and its content for that version appears. To return to the Content Approval tab, click **Close**.
3. Next to the version to restore, click **Click here to restore this version** under **Action**. A message appears to confirm the restoration of the version.
4. Click **OK**. You return to *Parts*.

Tags Tab

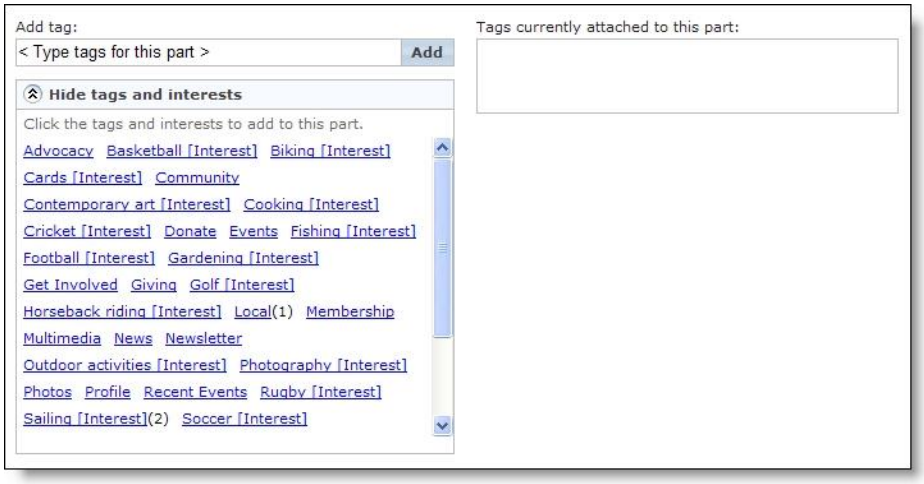
On the Tags tab, you enter keywords or phrases to identify a part's content. You can also associate user interests with the part. When the part is on a web page with a Tag Display part, its tags and user interests appear as hyperlinks. Users can click the links to access similar content from a list of the web pages that contain parts associated with the tags and user interests. For information about how to display tags as hyperlinks, see Tag Display on page 163.

Add tags

1. Select the Tags tab.

2. To view the tags and user interests, click **Existing tags and interests**. Links appear for existing tags and user interests.

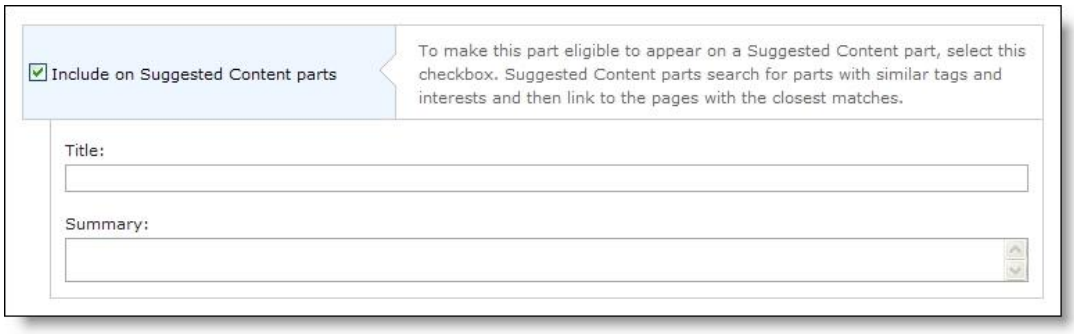
Note: A number beside a tag or user interest indicates how many parts use it. This information also appears in autocomplete text in the **Add Tag** field.



3. To associate existing tags and user interests with the part, click the links. The items appear under **Tags currently attached to this part**.
4. To create a tag, enter a word or phrase in the **Add tag** field and click **Add**. The tag appears under **Tags currently attached to this part**.

Note: To save data entry time, the program uses autocomplete to suggest existing tags from the Site Tags code table. When you add tags, the program adds them to the code table. For information about how to manage the Site Tags code table, see the *Administration Guide*.

5. To remove a tag or user interest, click the "x" beside it under **Tags currently attached to this part**.



6. To allow Suggested Content parts to link to the part, select **Include on Suggested Content parts**. The Suggested Content part searches for parts with matching tags and user interests to recommend content to website users. For information about the Suggested Content part, see Suggested Content on page 154.
7. In the **Title** field, enter a header to display on a Suggested Content part when it recommends the part. The header links users to the part's web page.
8. In the **Summary** field, enter a short description to appear on a Suggested Content part.
9. Click **Save**. You return to *Parts*.

Advanced Donation Form

Tip: For best practice information about donation forms, refer to Best Practices for Donation Forms.

The Advanced Donation Form part is an alternative to the standard Donation Form part. The Advanced Donation Form allows for customizations by your organization so you can enter your own HTML and JavaScript to create features for the part the standard part does not include. For example, you can create a customization that supports donations to various schools and designations or shopping cart functionality.

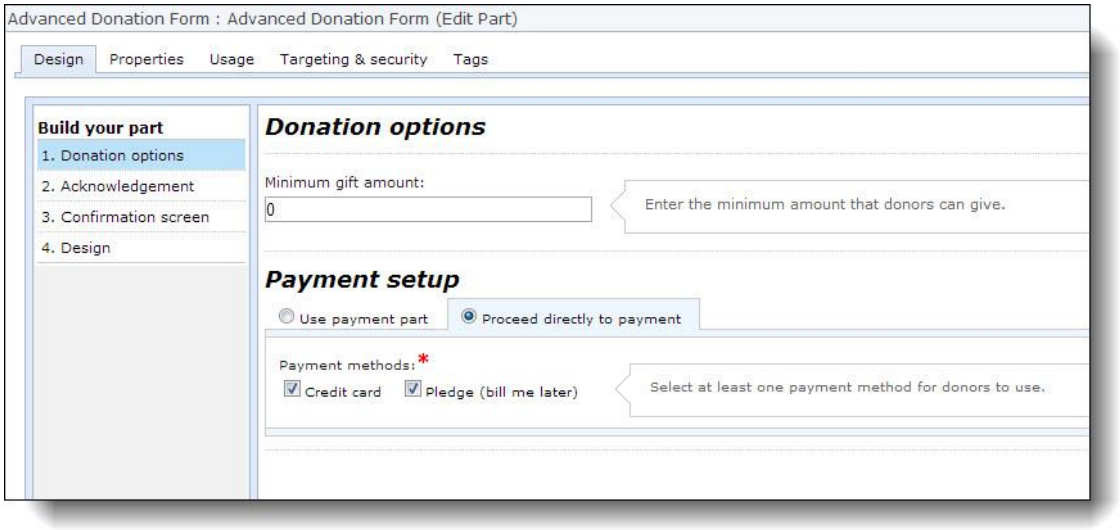
Note: The Advanced Donation Form part offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this page. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this part. For information about the API, including REST API information, see the Developer Guide. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

You download and manage transactions from the Advanced Donation part in Blackbaud CRM the same way you download and manage transactions from the standard Donation Form. For information about how to process donation transactions in Blackbaud CRM, see the *Web Transactions Guide*.

Design Advanced Donation Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, to view donation options, select **1. Donation options** under **Build your part**.



   a. In the **Minimum gift amount** field, enter the minimum donation a donor can contribute. Enter "0" or leave the field blank to allow donors to contribute any gift amount.

   b. Under **Payment setup**, select the payment options for website users.

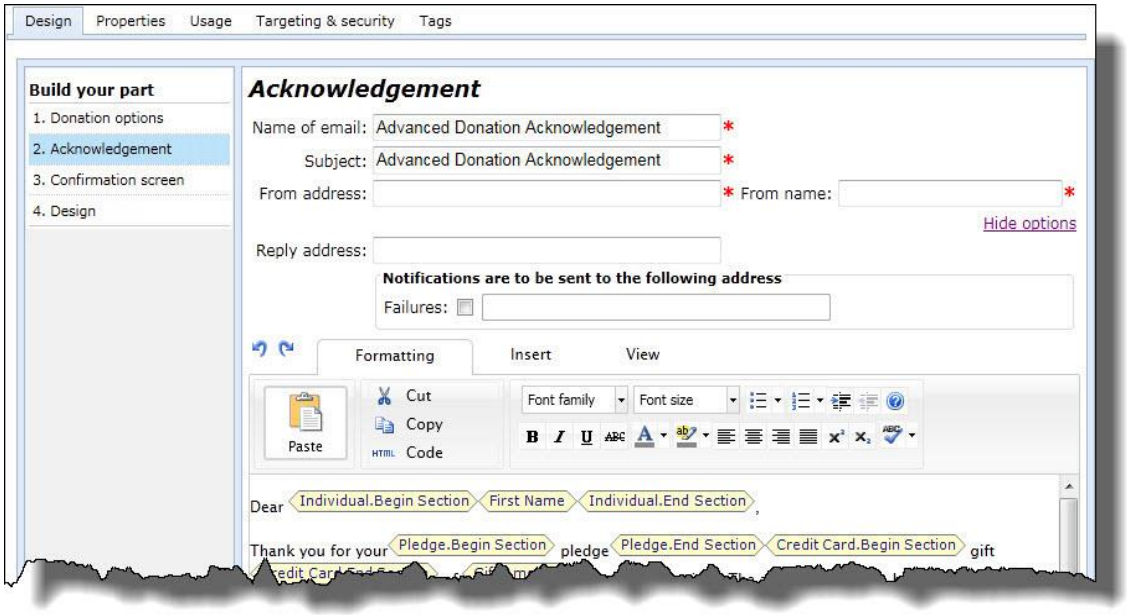
   - To allow website users to pay for multiple transactions at one time, select **Use payment part**. In the **Payment page** field, select the web page to use to process donations. The Payment 2.0 part on the

selected page determines the payment methods and merchant account used to process donations. For information about the Payment 2.0 part, see Payment 2.0 on page 107.

- To require website users to pay for donations one at a time, select **Proceed directly to payment**. Under **Payment methods**, select the payment methods to offer to website users. You can allow users to pay by credit card or make a pledge to pay later.

  When you select **Proceed directly to payment** and the user clicks **Donate** on the part's web page, the program uses the secure payment page to process the biographical billing information and payment information. For more information about this page, refer to Secure Payment Page on page 112. For more information about customizing this design, refer to the Developer Guide.

2. To view email options, select **2. Acknowledgement** under **Build your part**.



   a. Under **Acknowledgement**, enter information for the email such as the subject and from email address.

      To receive responses from recipients at a different email address than the one you use to send the message, click **More Options** and enter the address in the **Reply Address** field.

   b. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages when email messages are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

      Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see the *Email Guide*.

   c. The bottom pane displays the acknowledgement email content. To format the message's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

Note: When you select **Use payment part** on the **1. Donation options** step to integrate this part with a Payment 2.0 part, the email fields on this step do not appear but you can use the HTML editor to design content. The program uses the Payment 2.0 part's acknowledgement information for the email. On the

Payment 2.0 part, use the **Combined Acknowledgements** merge field to consolidate this acknowledgement content with the Payment 2.0 part's content. If you do not include the merge field on the Payment 2.0 part, website users do not receive the content from this part.

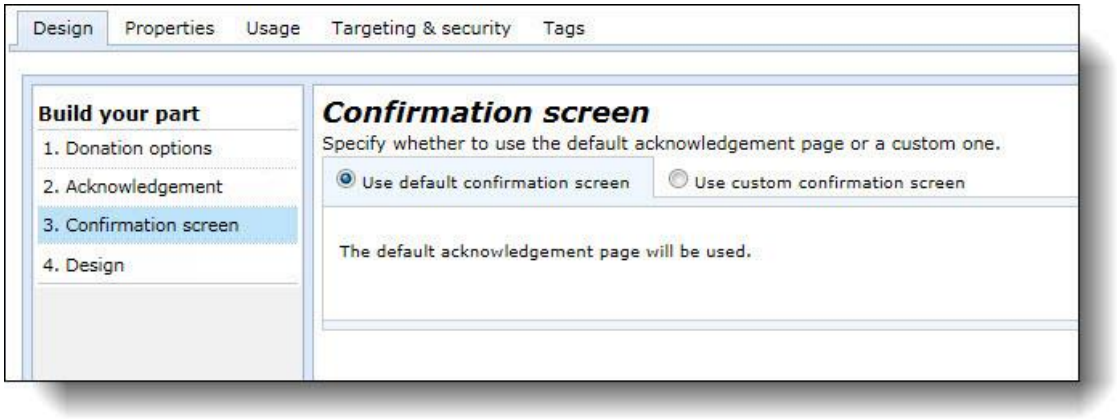
Blackbaud recommends that you use inline styles, such as Welcome color , when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

d. To personalize the message with information about the constituent, add merge fields. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar. Next, double-click or drag and drop the field in the content area.

e. In the body of the email, put fields where you want them to appear. For example, enter "Hello First Name." In the email, the recipient reads "Hello [the recipient's first name]." To move a field, click and drag it to the new location.

3. To design the donation summary that appears after a user submits a donation, select **3. Confirmation Screen** under **Build your part**.

Tip: When you select **Use payment part** on the **1. Donation options** step, this step disables and the program uses the Payment 2.0 part's confirmation screen design to display the donation summary after a user submits a donation.



a. To use the program's default confirmation screen, select **Use default confirmation screen**.

b. To customize a confirmation screen, select **Use custom confirmation screen**. The HTML editor appears. The program's default confirmation screen appears in the HTML editor for you to customize according to your needs.

In the box, edit the content to appear for the donation summary. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

Tip: Customizations for the confirmation screen remain even if you select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Load Confirmation Template**. The program's default confirmation screen appears in the HTML editor for you to customize again.

4. To customize the part for your donation page, select **4. Design** under **Build your part**. In the box that appears, sample code defaults for you to use as a starting point and reference. Enter your own code,

such as JavaScript, to customize features for your donation page. For information about the API, including REST API information, refer to the Developer Guide.

There are several important items to remember about the Advanced Donation Form part as you design your donation page.

- You can enter your own HTML and JavaScript to create features for the part. For example, you can create a customization that supports donations to various schools and designations or shopping cart functionality.
- The endpoints you use in this box honor security. For example, users who do not have rights to view this part also do not have rights to view its endpoints.
- If you use third-party software, such as *Drupal*, to customize the part, we recommend you create a subdomain for the page to communicate with Blackbaud Internet Solutions.
- Whether you host your site or Blackbaud hosts your site, the secure payment page on the hosted Blackbaud server processes all credit card payments for the Advanced Donation Form part. For more information about Blackbaud secure payment, see Secure Payment Page on page 112.

5. Click **Save**. You return to *Parts*.

Feature Comparison

Review the following table for differences between the Advanced Donation Form part you can customize and the standard Donation Form on page 39.

Feature	Advanced Donation Form	Donation Form
Appeals	Yes	Yes
Anonymous gift	Yes	Yes
Corporate gift	Yes	Yes
Finder number (when you integrate with Blackbaud Direct Marketing)	Yes	Yes

Feature	Advanced Donation Form	Donation Form
Gift comments	Yes	Yes
Recurring gifts	Yes	Yes
Revenue attributes	Yes	Yes
One-time gifts	Yes	Yes
Payment 2.0 support	Yes	Yes
Pledge (Bill me later)	Yes	Yes
QAS	Yes	Yes
Tribute	Yes	Yes
Designation search	Yes, but you must use JavaScript in the part	Yes
Direct debit	Yes, but you must integrate the part with a Payment 2.0 part	Yes
Donor challenge	No	Yes
eCards	No	Yes
eReceipts	No	Yes
Email notifications	No	Yes
Impact statement	No	Yes
Matching gift	No	Yes
Name format field entry	No	Yes
Spouse information and joint gifts	No	Yes
reCAPTCHA	No	Yes
Marketing source code	Yes	No

Anonymous Newsletter Subscription

With the Anonymous Newsletter Subscription part, you can offer a newsletter for website users to subscribe to without registering on your website. Because the subscriber does not create a user account, no sign-up transaction or constituent record is created in Blackbaud CRM. Typically, you may want to enable anonymous subscriptions for a particular newsletter, such as an introductory newsletter, that leads subscribers to become more involved with your organization and become active users and constituents.

Tip: To keep information for anonymous newsletter subscribers private, subscriber data is stored in the online database. You cannot view it on the administrative side of the website.

On the web page, the Anonymous Newsletter Subscription part appears as a box where users can enter their names and email addresses and click a button to subscribe.

Design Anonymous Newsletter Subscription

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Newsletter** field, select the newsletter that users can anonymously subscribe to.

2. In the **Form title** field, enter the text to appear at the top of the Anonymous Newsletter Subscription part on your website, such as "Get the Newsletter!"
3. In the **After subscribing navigate to** field, select the web page, such as a Welcome or Thank You page, to appear after the site user clicks **Subscribe**.

Note: If you do not select a web page in the **After subscribing navigate to** field, the website user returns to the Anonymous Newsletter Subscription part after he clicks **Subscribe**.

4. Click **Save**. You return to *Parts*.

Change User ID/Password

With the Change User ID/Password part, website users can change their usernames and passwords in the online database without affecting the usernames and passwords for other integrated Blackbaud programs. On the website, the user can update the username and password.

Design Change User ID/Password

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **After update navigate to** field, select the web page to appear after the website user changes the username and password.

Note: If you do not select a web page in the **After update navigate to** field, the Home Page selected on the Settings tab in *Sites & settings* automatically appears after the website user changes the username or password.

2. In the **Fields** grid, select the fields to display on your Change User ID/Password form. You can include the **User Name**, **Password**, **Confirm Password**, and **Time Zone** fields. For details about the grid, see Change User ID/Password Fields Grid on page 23.

Note: If the site only collects email addresses for user logins, **Email Address** appears instead of **User Name** as the login field option.

3. Click **Save**. You return to *Parts*.

Change User ID/Password Fields Grid

The table provides information about the options in the **Fields** grid on the Change User ID/Password part.

Option	Program Administrator or Website User?	Notes
Include	Program	Select the checkbox next to the fields to include on your Change User ID/Password form.
Field	N/A	Displays the default field name for your Change User ID/Password form.
Editable	Program and website	To enable other users to edit the field, select this checkbox.
Required	Website	To make a field required on the Change User ID/Password form, select this checkbox.

Content Comparison

With the Content Comparison part, you can compare the effectiveness of different appeals to your website users. For example, you can create multiple Formatted Text and Images parts to promote an event or to solicit donations. On the Content Comparison part, you add up to six of these parts and select a target page, such as a page with an event registration form or donation form. After you place the Content Comparison part on a page, it randomly displays the Formatted Text and Images parts to website users and tracks the click-through rate to

the target page. After a user views the comparison, the program associates the user with a particular Formatted Text and Images part so that each user only sees one part in the comparison. To track users, the Content Comparison part uses the login information or cookies that identify the user's computer.

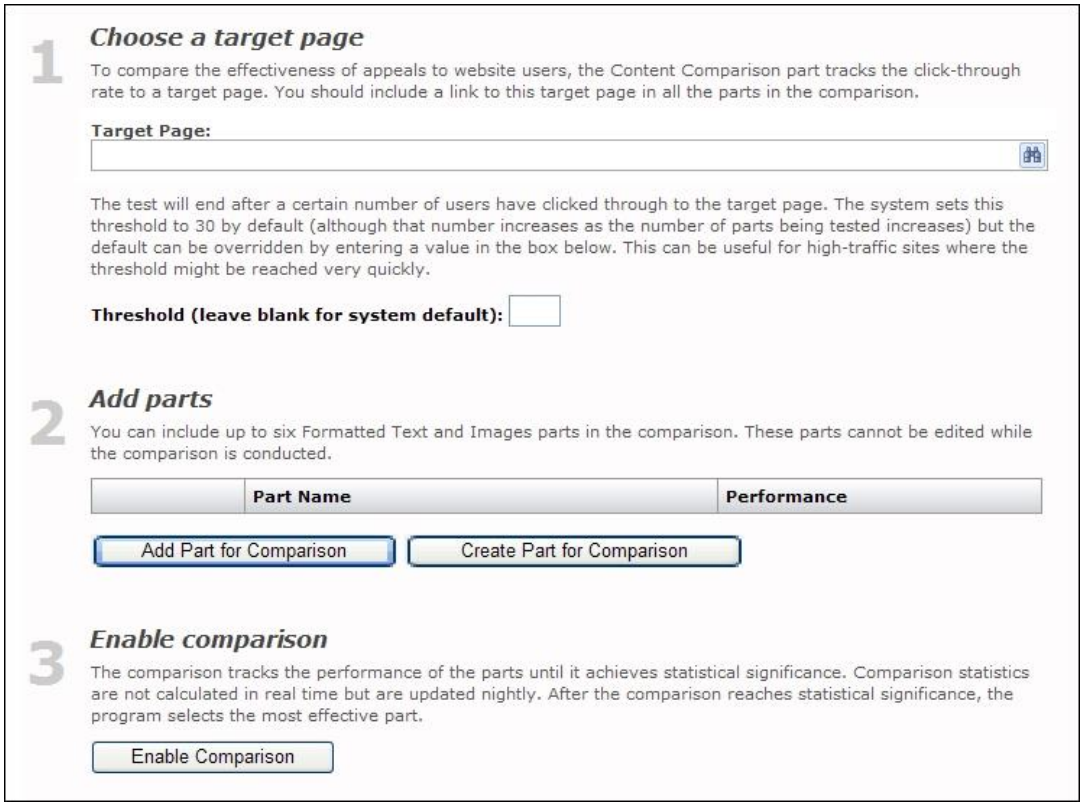
The Formatted Text and Images parts in the comparison must include links to the target page because the comparison measures their effectiveness by the click-through rate to the target page. The comparison also measures the conversion rate if the target page includes a donation form, event registration form, payment part, survey part, or user login. For example, if the target page includes an event registration form, the comparison tracks how many users register for the event. If the target page includes a donation form, the comparison also tracks the amount donated.

The Content Comparison part tracks the performance of Formatted Text and Images parts until it achieves statistical significance. The number of Formatted Text and Images parts in the comparison determines the default threshold to reach statistical significance, but you can also select your own threshold. Comparison statistics are not calculated in real time but are updated nightly. After the comparison reaches statistical significance, the Content Comparison part ends the comparison and displays only the most effective Text and Formatted Images part. If you decide to use a different Text and Formatted Images part, you can override this selection.

Design Content Comparison

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, browse to the target page for the comparison. To track the click-through rate, the Formatted Text and Images parts in the comparison must include a link to the target page.



The comparison measures the effectiveness of the Formatted Text and Images parts by the click-through rate. It also measures the conversion rate if the target page includes a donation form, event registration

form, payment part, survey part, or user login. If the target page includes a donation form, the comparison also tracks the amount donated.

2. To override the default threshold for the comparison, enter the number of users who must click through to the target page in the **Threshold** field. The default threshold to achieve statistical significance is based on the number of Formatted Text and Images parts in the comparison.
3. Under **Add parts**, add parts to the comparison. You can only include up to six different Formatted Text and Images parts. You cannot edit the parts during the comparison.
    - To add an existing part, click **Add Part for Comparison**. The Select a Part screen appears with all available Formatted Text and Images parts.
    - To create a part, click **Create Part for Comparison**. The New Part screen appears with "Formatted Text and Images" in the **Part Type** field. For information about how to create a Formatted Text and Images part, see Formatted Text and Images on page 68.

Note: After you add Formatted Text and Images parts to the comparison, you can edit and delete the parts from the Content Comparison part. After you start the comparison, you can no longer edit or delete the parts. In addition, while a Formatted Text and Images part is placed on the Content Comparison part, you cannot delete it elsewhere in the program.

4. To start the comparison, click **Enable Comparison**. The status appears. The comparison tracks the performance of the Formatted Text and Images parts until it achieves statistical significance.
5. After you enable the comparison, click **View Report** to view details.
6. Click **Save**. You return to *Parts*.

Custom Parts

In *Administration*, *Custom parts*, you can create a new custom content part type or link to an existing framework part type. After you create or link to the part type, it is available for selection in *Parts*.

Note: *Custom parts* offer additional flexibility, but come with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design them. This includes writing HTML and JavaScript code. Users without this expertise should not design these parts. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

To create a custom content part type, click **New content part**. A custom content part uses JavaScript and HTML to create the part editor and define how to display the part on a web page. You can use custom content parts to create customizations such as slideshows, tabbed content, RSS Feed readers, accordion content, pop-up boxes, and callout boxes.

To link to an existing framework part type, click **New framework part**. To build custom framework parts for your website, you should understand Blackbaud Internet Solutions from a site designer's perspective and have a working technical knowledge of ASP.NET. The content for custom framework parts can come from a variety of sources and can be as simple as text or HTML stored in the Blackbaud Internet Solutions database, or it can be data from the back office such as constituent giving history. For example, you can use a custom framework part to create a custom individual search form or a custom pledge form for Blackbaud Internet Solutions.

To learn more about custom content parts, review Anatomy of a Custom Framework Part and Custom Content Parts. You can also contact Professional Services. For information about how to create custom framework parts, visit the Blackbaud Developer Network or refer to the Developer Guide.

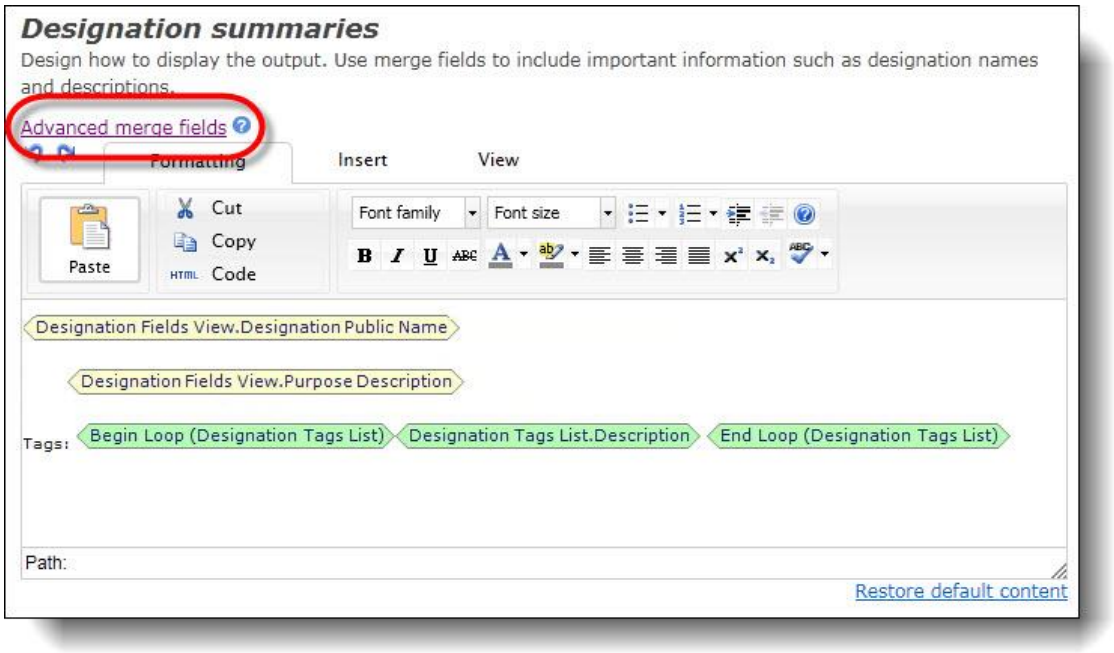
Designation Details

Use the Designation Details part to provide a detailed description of a designation. For example, the Designation Search part displays a short description of each designation. To provide a more detailed description, you can link from the search results to a page that contains a Designation Details part.

Design Designation Details

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Designation summaries**, design the search results display. Use merge fields to include information about designations included in the results. The text box includes the **Public Name**, **Purpose Description**, and **Designation Tags List** merge fields by default. If you need other merge fields, click **Advanced merge fields** to select additional field groups. After you select field groups, the **Merge fields** button on the Insert tab in the toolbar appears so you can add the additional merge fields to the display.



To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

Tip: To include an **Add to cart** link, insert the **Designation.BeginAddtoCart** and **Designation.EndAddtoCart** merge fields. Users can click this link to add designations in the search results to their shopping carts.

2. Click **Save**. You return to *Parts*.

Designation Search

With the Designation Search part, website users can enter key words or select search filters to search for designations. You can choose the type of filters available for the search and you can design the content for the search results display.

Warning: To avoid data conflicts, you can add only one Designation Search part on a web page. You also cannot add a Record Search part to a page that contains a Designation Search part.

You can use the Designation Search part with other parts to create a powerful designation search feature on your website. For example, this is one possible workflow:

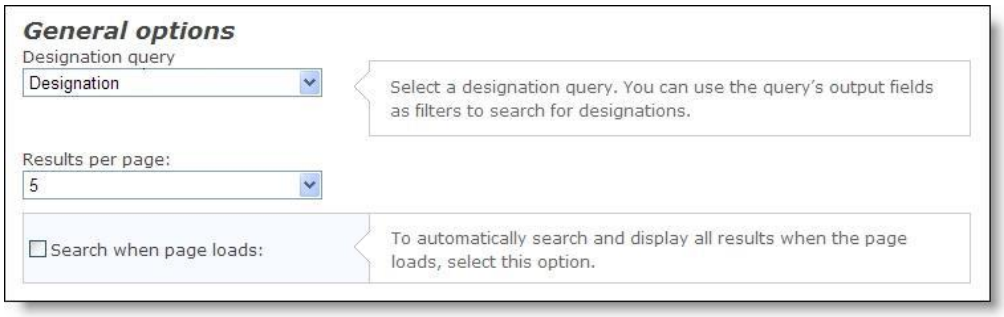
- The search results include a short description of each designation that meet the search terms. To provide a more detailed description, you can add a link from your Designation Search part to a page that contains a Designation Details part or to another web page that contains more information about the designation. For more information, see Designation Details on page 26.
- To guide users to designations based on their interests, add a Suggested Content part. The Suggested Content part recommends designations that match the user's interests and the tags assigned to parts they have recently accessed. For example, if the user has "Whales" assigned as a user interest on his constituent record and he viewed parts with a "Whales" tag, the Suggested Content part recommends designations dedicated to whales. For more information, see Suggested Content on page 154.

- When you add a Payment Summary 2.0 part to your template, users can view all the transactions currently in their shopping carts, including any payments for designations. For more information, see Payment Summary 2.0 on page 116.
- To include a list of designations that a user donated to in the past, you can include a Query Results Display part. For more information, see Query Results Display on page 125.

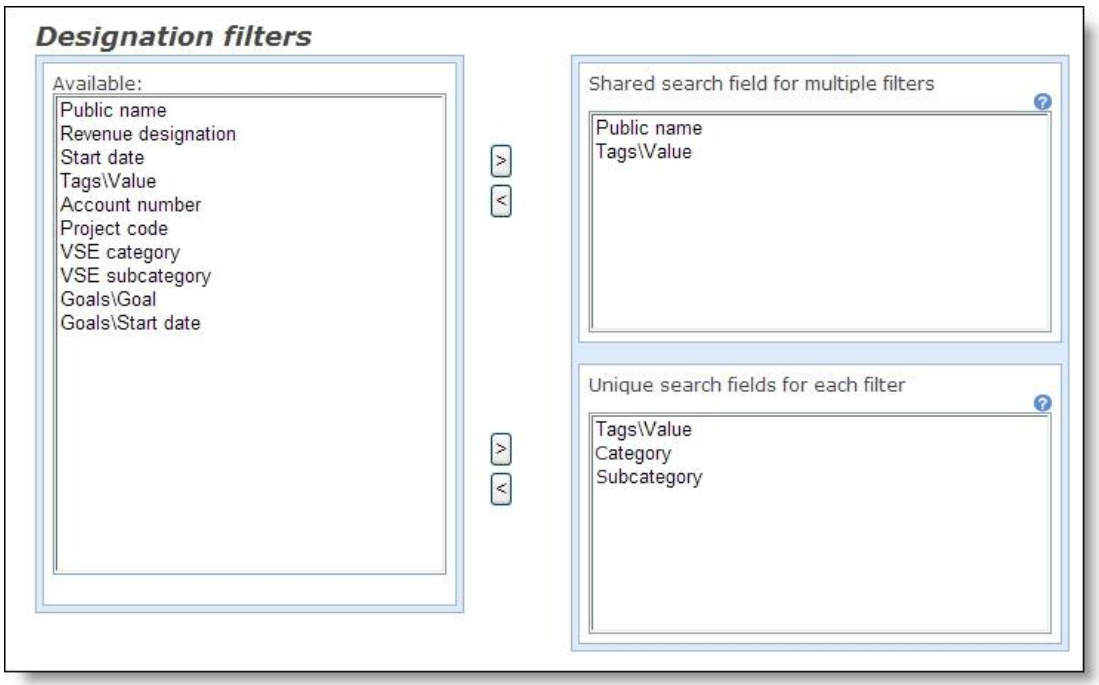
Design Designation Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General options**, select a query in the **Designation query** field. The output fields from the selected query are used as search filters on the designation search form.

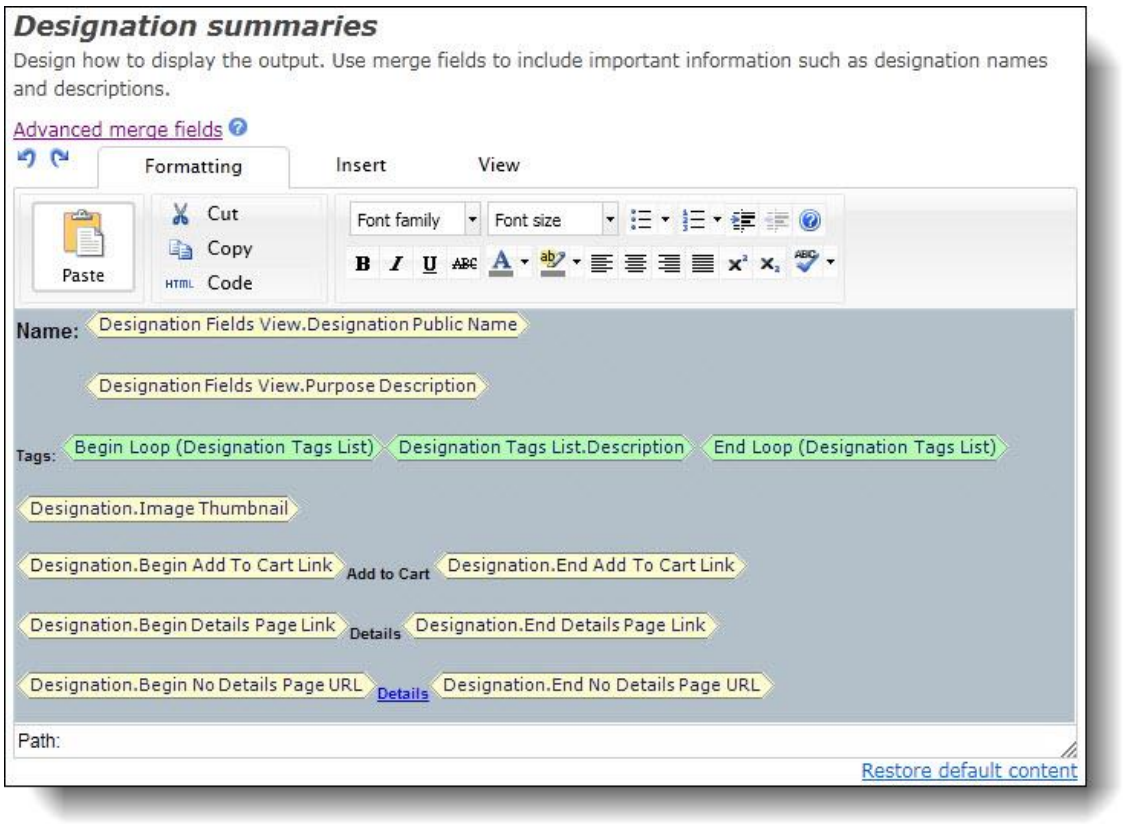


2. In the **Results per page** field, select the number of results to display on the page. If the search returns more results than the number entered, the results display on additional pages.
3. Select **Search when page loads** to automatically search and display all results when the page loads.
4. Under **Designation filters**, move fields from the **Available** box to the boxes on the right.



- **Shared search field for multiple filters** — This option creates a single keyword search field for multiple filters. For example, you include the public name and description as filter fields. Users can enter keywords in a search field and the program will return any public names or descriptions that match the keywords. For fields where users select from finite lists such as code table entries, it may be better to use the **Unique search fields for each filter** option.
- **Unique search fields for each filter** — This option creates multiple search fields to provide precise search results for each filter. This is most useful for fields where users select from finite lists such as code table entries. For example, if you include the designation's purpose category and tags, users can select from the available categories and tags.

5. Under **Designation summaries**, design the search results display. Use merge fields to include information about designations included in the results. The text box includes the **Public Name**, **Purpose Description**, and **Designation Tags List** merge fields by default. If you need other merge fields, click **Advanced merge fields** to select additional field groups. After you select field groups, the **Merge fields** button on the Insert tab in the toolbar appears so you can add the additional merge fields to the display.



To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

Tip: If you assigned details page URLs to the Web tab of designation records in Blackbaud CRM, you can add the **Designation.BeginDetailsPageLink** and **Designation.EndDetailsPageLink** merge fields to include a link to the specified URL. If you did not assign URLs to designation records, you can add the **Designation.BeginNoDetailsPageURL** and **Designation.EndNoDetailsPageURL** merge fields and insert a link to a page that contains a Designation Details part.

Tip: If you assigned thumbnail images on the Web tab of designation records in Blackbaud CRM, you can add the **Designation.ImageThumbnail** merge field to include the image in the search results.

Tip: To include an **Add to cart** link, insert the **Designation.BeginAddtoCart** and **Designation.EndAddtoCart** merge fields. Users can click this link to add designations in the search results to their Payment 2.0 shopping carts.

6. Click **Save**. You return to *Parts*.

Directory

With a Directory part, you can allow website users to search for other website users in defined groups of constituents. Users can then view profile displays to learn more about constituents. To publish directories on your website, you use constituent queries to access information about website users. For example, you can create a constituent query for the Class of 2000 in Blackbaud CRM and use it to create a directory of users in that class. You can then select fields for website users to search against. For example, you can allow users to search the directory for data in the **First Name**, **Last name**, and **State** fields. You can also provide links from the directory to constituent personal pages.

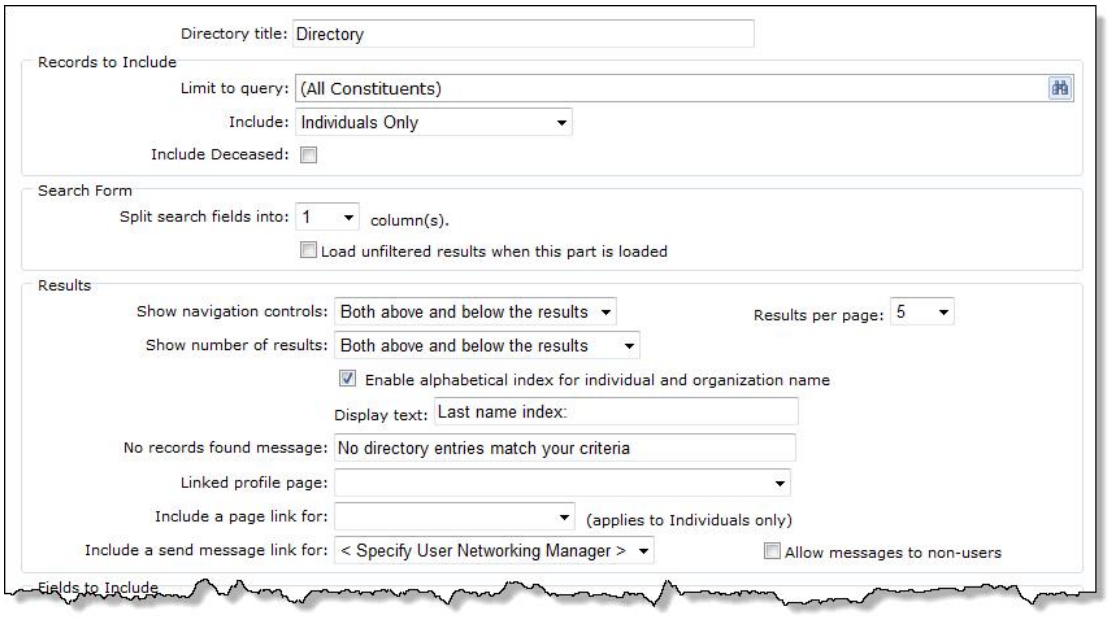
Note: The directory search can return up to 500 results that match the criteria entered by a site user. Site users can use wildcard characters (brackets, underscores, percents, question marks, and asterisks) in their search criteria.

You also select the fields to appear on your web page when the user's search produces results. For example, you can select to display **First Name**, **Last name**, **Address Line 1**, **City**, and **State** fields for your directory results. The field you list first for results links to the constituent's published profile information.

Design Directory

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Directory title** field, enter a name for the directory, such as "Class of 2000 Directory."



2. Under **Records to Include**, specify the records to include in the directory's search results.
    a. The **Limit to query** field displays the selected query of records included in the directory. By default, “All Constituents” appears.

Tip: For a query to appear as a selection, you must first create it in Blackbaud CRM. When you create a query, you may need to refresh the website for it to appear as a selection. To refresh, select **View**, **Refresh** from the menu bar.

To include information from all constituents in your database, leave the default “All Constituents.” To select another existing constituent query to use as the directory, click **Change**. The Query Search screen appears. For information about how to use the Search screen, see the *Program Basics Guide*.

    b. In the **Include** field, select the type of constituent records to include in the directory search results. You can select “Both Organizations & Individuals,” “Individuals Only,” or “Organizations Only.”
    c. To include deceased constituents in the directory search results, select **Include Deceased**.
3. When you use the Academic Catalog in Blackbaud CRM, an **Education Fields** section appears. In the **Include** field, select whether to include academic information from affiliated educational institutions only or both affiliated and unaffiliated institutions for the search and results filters.

Tip: To improve search performance, narrow the volume of institutions to search by selecting "Affiliated educational institutions" in the **Include** field. After you save the part, you cannot change your selection in this field.

In addition to this section, more educational fields are available to integrate Academic Catalog data with this part on your website. Under **Available Fields**, in the **Additional Information** nodes for **Primary Alumni** and **Education History**, the **College/School**, **Division**, **Department**, **Sub Department**, and **Degree type** fields appear to support the integration. When you use these fields, website users can search and view the information in the directory display window for affiliated and unaffiliated institutions, depending on the selection you make in this section. For example if you select "Affiliated educational institutions" and include the **Department** field, users can narrow their search by selecting a department and then view the information in the search results for affiliated institutions only. Also, you can use the

Program and **Degree** fields under the **Primary Alumni** and **Education History** nodes to search and display this data for affiliated and unaffiliated institutions.

Note: When you enable or disable the Academic Catalog in Blackbaud CRM and then add or remove Academic Catalog fields on the part for your web page, the changes do not reflect on your website for approximately 20 minutes.

4. Under **Search Form**, in the **Split search fields into** field, select how many columns of search fields to appear in the criteria table. You can display up to five columns.

   To process a search while the user browses your Directory part, select **Load unfiltered results when this part is loaded**. When you select this checkbox, the directory search processes before the user enters criteria and clicks **Search** on your website.

5. Under **Results**, set up how search results appear on your Directory part.

   a. In the **Show navigation controls** field, select whether the navigation buttons should appear above the results, below the results, or both above and below the results.

   b. The directory search can return up to 500 results that match the criteria entered by a site user. In the **Results per page** field, select the maximum number of results to appear on a page when a site user searches the directory. You can display up to 50 results per page.

   c. You can include in the search results the total number of records that met the user's search criteria. In the **Show number of results** field, select whether to display the total number of results above the results, below the results, or both above and below the results.

   d. To display an alphabetical index so that website users can filter search results by the first letter of last names and organization names, select **Enable alphabetical index for individual and organization name**. Then in the **Display text** field, enter the field label to display beside the alphabetical index.

   e. In the **No records found message** field, enter the message to appear if no records meet the search criteria the user enters to search the Directory on your website. By default, the message "No directory entries match your criteria" appears.

   f. Directory results can link to a page that contains a Profile Display part. In the **Linked profile page** field, select the page to link to. The field you list first in the **Listing Fields** box becomes the link to the page you select in **Linked profile page** field.

Note: When website users open profile pages from directory search results, a **Back to search results** link appears at the top of the page.

   g. To allow website users to send personal messages to constituents in the results, in the **Include a send message link for** field, select the User Networking Manager part to link to the directory results.

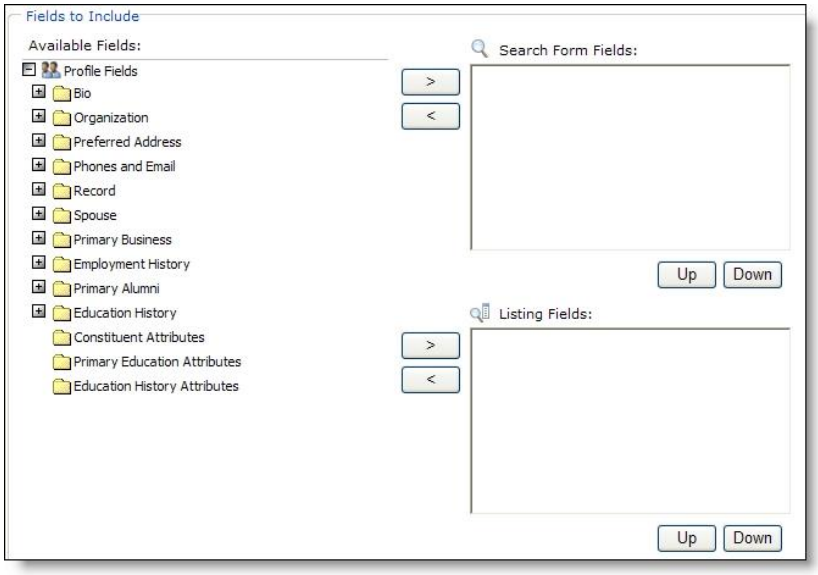
Note: If constituents opt out of email in Blackbaud CRM, website users can send them personal messages through the user networking site, but they cannot send them email messages.

   h. To allow website users to send personal messages through the User Networking Manager part to constituents who are not registered website users or who are registered but are not members of the user networking site, select **Allow messages to non-users**.

Warning: Constituents who do not have user networking accounts receive personal messages through email. To allow users to send email messages to these constituents, you must enable a Directory Message Notification in *Email* and select the User Networking Manager part for it. Without this notification, your users will not be able to send messages to constituents who are not registered website users or to constituents who do not have

social networking accounts. For more information about notifications, see the *Email Guide*.

6. Under **Fields to Include**, select the fields the user uses to search the directory, such as **First Name** or **Last name**. Drag the field from the **Available Fields** box to the **Search Form Fields** box, or select the field in the **Available Fields** box and click the right arrow to move it to the **Search Form Fields** box.



When you integrate with Blackbaud CRM, do not include the **Business.County** or **PreferredAddress.County** field in the **Search Form Fields** box. Blackbaud CRM does not support these fields in a directory search.

Note: The system administrator selects the attributes available on the Settings tab on the Settings tab in *Sites & settings*. For information, see the *Administration Guide*.

To arrange the placement of a field in the **Search Form Fields** box, select the field and click the **Up** or **Down** button.

Note: The fields in the **Search Form Fields** list and the **Listing Fields** list do not have to match.

7. Next, under **Fields to Include**, select the fields to appear in the directory display window. Drag the field from the **Available Fields** box to the **Listing Fields** box, or select the field in the **Available Fields** box and click the right arrow to move it to the **Listing Fields** box.

   To arrange the placement of a field in the **Listing Fields** box, select the field and click the **Up** or **Down** button.

   While you can link every field, the field you place first in the **Listing Fields** box automatically links to the page you select in the **Linked Page** field. For example, you select to display the alumni's last name, first name, birth date, and address. In this case, the last name is the link. When results appear, to indicate the last name is a link, it is underlined and changes color when you drag your mouse over it. When a website user clicks the alumnus's last name, the published profile information for that constituent appears.

Note: When a website user selects the **Make my primary email address private** checkbox on your Profile Update Form web page, it also designates their primary email address as private for this part on a web page.For more information, refer to Contact Information.

8. Click **Save**. You return to *Parts*.

Discussion Group

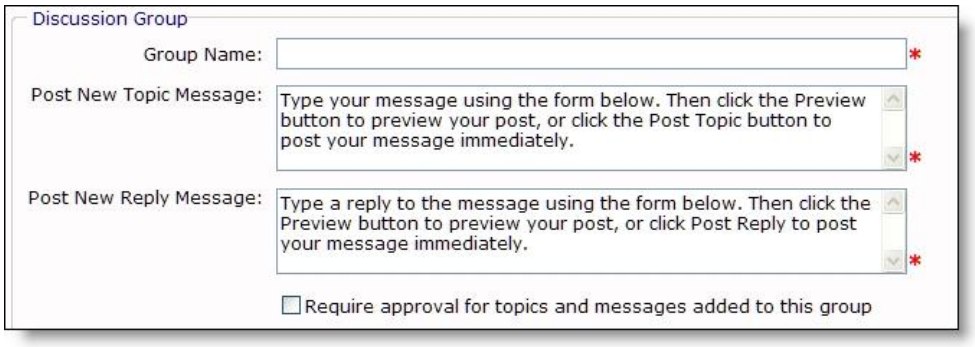
Select the Discussion Group part type to create an electronic bulletin board so website users can participate in interactive discussions. For example, you can create a Reunion 2007 Discussion Group for your alumni to plan events and arrange to meet with old friends. Website users can submit new topics or add responses to existing topics in this electronic bulletin board. Your organization can create multiple Discussion Group part types to post on your website.

If you have manager rights, you can approve and delete messages and topics posted to the website. Additional buttons also appear on messages for discussion group managers. To block the content of a message without affecting replies to the message, click **Block**. To delete a message and all replies to the message, click **Prune**.

Design Discussion Group

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Group Name** field, enter the main topic of discussion to generate, such as "Reunion 2007."



2. In the **Post New Topic Message** box, enter the message to appear on your website to provide users with more information about the discussion topic. For example, enter "Post a new topic for the Reunion 2007 discussion group. Feel free to start a discussion about a reunion event or meeting with friends at your favorite old college hang-outs!"

Note: The website user's message box for postings is limited to 3000 characters.

3. In the **Post New Reply Message** box, enter the message to appear on your website for users who post a message. For example, enter "Thank you for participating in the Reunion 2007 discussion! We look forward to seeing you on campus!"
4. If you select **Require approval for topics and messages added to this group**, topics and messages posted by users with Can Manage rights appear on your website immediately. A user with manager rights must approve other topics.

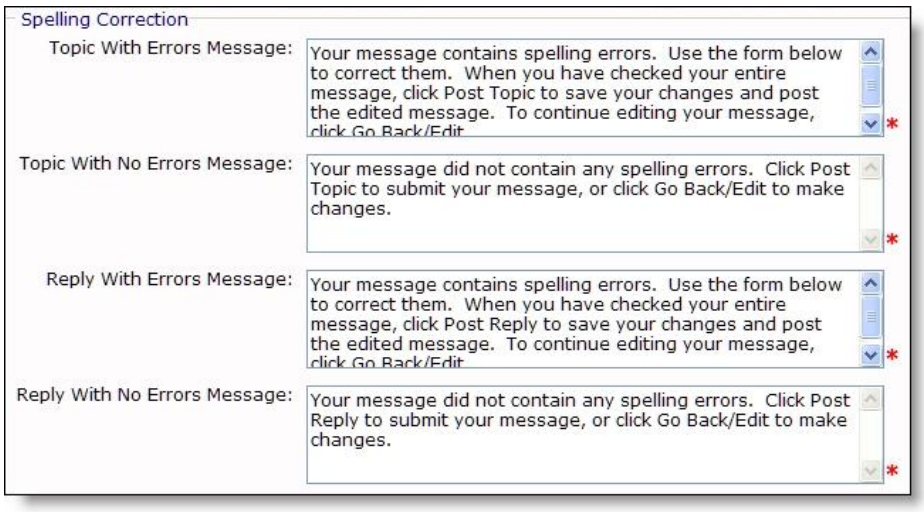
Warning: If you do not select this checkbox, all topics appear immediately on your website.

5. Under **Security Rights**, assign Manage rights to roles for discussion group users. To assign Can Manage rights to a role, select its checkbox.

To include additional users and roles, select **Add users and roles**.

Note: Managers can approve or delete any messages and topics added to groups. Additional buttons appear on messages for managers. To block the content of a message without affecting replies to the message, click **Block**. To delete a message and all replies to the message, click **Prune**. For more information about how to manage a discussion group, see Manage Discussion Group on page 36.

6. To allow users to participate in the discussion group anonymously, select **Allow Anonymous Posting**. In the **Choose a default display name for an Anonymous poster** field, enter the name to appear when an anonymous user posts on the discussion group, such as "Anonymous."
7. Under **Spelling Correction**, customize the messages on your website for users who participate in the discussion group.



   a. In the **Topic With Errors Message** box, enter the message to appear if a website user posts a new topic with spelling errors.
   b. In the **Topic With No Errors Message** box, enter the message to appear if a website user posts a new topic without any spelling errors.

c. In the **Reply With Errors Message** box, enter the message to appear if a website user posts a response to an existing topic with spelling errors.

d. In the **Reply With No Errors Message** box, enter the message to appear if a website user posts a response to an existing topic without spelling errors.

8. Click **Save**. You return to *Parts*.

Manage Discussion Group

If you are a user with Manage rights, you have additional options with the Discussion Group part type. These options are available when you log in to your website with your manager role.

1. Using your manager role with Manage rights, log in to your organization's website.
2. In the upper right corner of your Discussion Group part, the **View** field appears. In this field, select whether to view all postings, only approved postings, or only those postings pending approval.

Note: If **Require Approval for Topics Added to This Group** is not selected on the Edit Part screen for the discussion group, **Approve** does not appear on your website for users with manager roles. However, the **View** field and **Delete** remain available.

3. Manage the messages and topics of the discussion group.
   - To approve a message or topic, click **Approve** in the same row as the message or topic to approve. This makes the information available for all website users to view and respond.
   - To delete a message or topic, click **Delete** in the same row as the message or topic to remove. This permanently removes the information from the website.
   - To block the content of a message without affecting replies to the message, click **Block** in the same row as the message to block.

Note: When you click **Block**, the button changes to **Unblock**. To recover the message, click **Unblock**.

   - To delete a message and all its replies, click **Prune** in the same row as the message to prune. The program deletes only the selected message and its replies. Any messages posted in the topic prior to the pruned message remain.

4. To return to the administrative side of the program, log out of the website or click **Go to Blackbaud Internet Solutions** on the toolbar.

Documents

Using the Documents part, you can easily upload documents of any type to a web page and share the information. For example, you can upload a Microsoft *Word* document (*.doc file type) of your board meeting minutes. You can include a message to appear on the website page that provides details about the information the document contains. For your board meeting minutes *Word* document, you can include "Board Meeting minutes from 05/05/2007. Please call the office if you have questions or comments."

The ability to upload documents is based on security rights. For example, users with manager rights can approve and delete documents.

Note: If you do not want users to upload a document to a web page and want to create a link to a document for users to access, use the HTML editor. For more information, see the *Program Basics Guide*.

Design Documents

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, select a folder in *Files* to store the documents. You can also create a new folder on the Select Folder screen. The part displays all files in the folder.

2. In the **Title** field, enter a name to identify the documents on the web page. For example, enter "Board Meeting Minutes."
3. In the **Message** field, enter the message to appear on the web page. For example, you can provide details about the documents or instructions for site users.
4. In the **Upload button** field, enter a label for the button that website users click to upload documents to your website.

Tip: There is not a limit to the number of documents on your website. However, hardware space limitations may constrain the number of documents you are able to store in the online database. The more documents your website has, the more hardware space used.

5. In the **Maximum file size** field, enter the maximum size of a document to store on your site. The size is stored in kilobytes. By default, the maximum file size is typically 4096 KB.

Warning: To prevent possible Denial of Service attacks, there is a limit to the size of the files you can upload. The default is typically set to 4096 KB, but the system administrator can adjust it up to 10,000 KB. We do not recommend you go over this size. The administrator can specify this limit in the Web.Config file. For example, to increase the file size, add maxRequestLength="8192" (where 8192 is the file size) to the <httpRuntime useFullyQualifiedRedirectUrl="true" /> key. For very large files, increase the website timeout setting. For example, to increase the timeout setting, add executionTimeout="120" (where 120 is the duration in seconds) to the <httpRuntime useFullyQualifiedRedirectUrl="true" /> key. Before you maximize the document file sizes or website timeout settings, visit http://support.microsoft.com/?id=295626 and review the Microsoft Knowledgebase article.

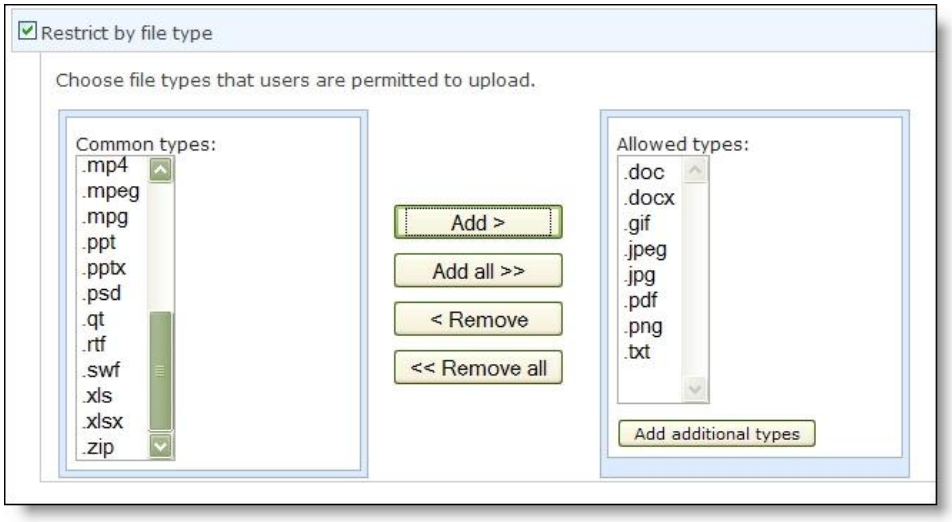
6. Specify whether uploaded documents require approval before they appear on your website.

- If you select **Require approval**, documents posted by users with Manage rights appear on your website immediately. Other documents must be approved by a user with manager rights.

Note: To enhance security for your website, we recommend you select **Require approval**.

- If you do not select **Require approval**, all documents appear immediately on your website.

7. To limit the file types available to upload to your site, select **Restrict by file type**.
   a. Under **Common types**, select the file type to make available on the site. To move the type from the Common types box to the **Allowed types** box, click **Add**.



   b. To move all file types at the same time, click **Add all**. All file types move to the Allowed types box.

8. To add file types not available under **Common types**, click **Add additional types**. The Add custom file type screen appears for you to enter the custom MIME type.

   For information about how to enter a custom MIME type, see Add Custom MIME File Types on page 39

9. Under **Security Rights**, specify the roles with manage and upload rights for the Documents part.

   a. In the **Manage** column, select the checkbox to assign manage rights to users and roles. This grants rights to add, edit, and delete documents. If the part is marked **Require Approval**, these users and roles can approve documents.

Note: If the part is marked **Require Approval**, documents are pending until a user with Manage rights approves them. A user with Upload rights can view his or her pending documents, but not those of other users with Upload rights. Only users with Manage rights can view all pending documents.

b. In the **Upload** column, select the checkbox to assign upload rights for documents to users and roles. This does not grant rights to edit or delete documents.

c. To include additional users and roles, select **Add users and roles**.

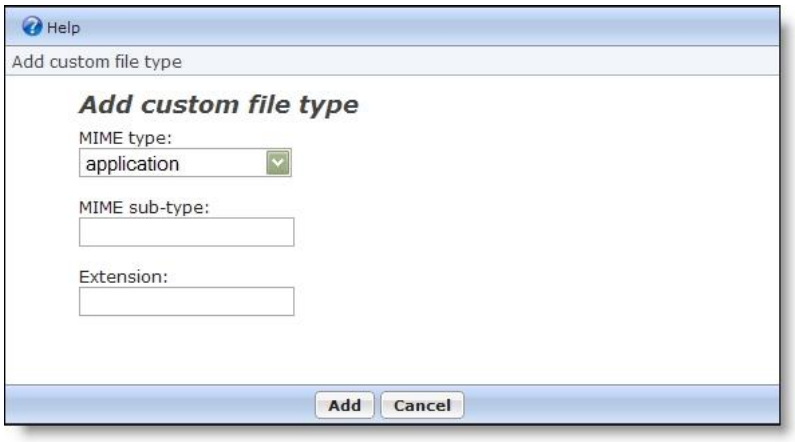
10. Click **Save**. You return to *Parts*.

Add Custom MIME File Types

On the Documents part when you select to restrict by file type, under **Common types**, 28 common file types pre-populate for you based on the Internet Assigned Numbers Authority (IANA) MIME Media Types standards. However, you can choose to add additional custom MIME types your organization allows for upload. For each custom file type, you enter the MIME type, sub-type, and extension.

Add a custom file type

1. From the Design tab, select **Restrict by file type**.
2. Under **Allowed types**, click **Add additional types**. The Add custom file type screen appears.



3. Select the MIME content type.
4. Enter the MIME sub-content type. For example, for the application content type, you enter msword, pdf, and postscript.
5. In the **Extension** field, enter the file extension for the sub-content type. For example, the file extension for msword is .doc or .docx, the file extension for pdf is .pdf, and the file extension for postscript is .ps.
6. Click **Add**. You return to the Design tab and the new custom file type appears under **Allowed types**.

Donation Form

Tip: For best practice information about donation forms, refer to Best Practices for Donation Forms.

For a new Donation Form part, you select the constituency, fund, and giving levels for web donations. When you select a Donation Form part for your web page, a canned donation form appears using the constituent code, fund, and giving level information you select.

The Donation Form part also contains an Acknowledgement screen. On this screen, you can create a standard email to send to donors who donate via your website.

As an alternative to the standard Donation Form, you can create the Advanced Donation Form part to design a custom donation page for your organization. This part provides a way for you to enter your own HTML and JavaScript to create features this part does not include. For example, you can create a customization that supports donations to various schools and designations or shopping cart functionality. For more information, see Advanced Donation Form on page 17.

When you download gifts from your website, you can create gift records for the donations in Blackbaud CRM. The gift records can include data such as amount, credit card number, billing address, an option to give anonymously, and comments.

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or Blackbaud CRM, select **Test Mode** on the Properties tab. For example, you can complete the fields on a donation form to ensure the confirmation page is styled and working properly. Although you submit the donation and receive a confirmation, a transaction does not appear on the Web Transactions page in Blackbaud CRM. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

- Design Donation Form: General and Donor Gift Schedule Options on page 40
- Design Donation Form: Donor Options on page 41
- Design Donation Form: Designations and Giving Levels on page 43
- Design Donation Form: Sources (Appeals), Donor Challenge, and Required Fields on page 43
- Design Donation Form: Additional, Spouse, and Attribute Information on page 45
- Design Donation Form: Payments and Pledges on page 46
- Design Donation Form: eCards on page 47
- Design Donation Form: eReceipts on page 48

Design Donation Form: General and Donor Gift Schedule Options

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

Tip: For best practice information about donation forms, refer to Best Practices for Donation Forms.

1. You can specify a constituency to apply to new and existing constituents who use this part to contribute and select the minimum amount the donor can enter.
   a. In the **Constituency** field, select a constituency to assign to donors.

      For more information about constituencies, see the Constituencies section of the *Program Basics Guide*.

   b. In the **Minimum Gift Amount** field, enter the minimum donation a donor can contribute. Enter "0" or leave this field blank to allow donors to contribute any gift amount.

2. To allow donors to contribute a single gift and pay the total amount at the time of the donation, select **Allow one-time gifts** under **Donor gift scheduling options**. A **One-time gift** option appears under **Type of gift** on the donation form.
3. To allow donors to contribute regular recurring gifts, select **Allow recurring gifts**. A **Recurring gift** option appears under **Type of gift** on the donation page. When a donor selects **Recurring gift**, **Frequency** options appear.

Tip: To avoid reconciliation conflicts in Blackbaud CRM, you cannot select direct debit payments for one-time payment gifts. This impacts multiple areas in Blackbaud Internet Solutions. When you configure this part and select this checkbox, a message appears to inform you to select credit card as the payment option. On the donation web page, when a website user selects **One-time gift**, the Direct Debit payment option removes so the user cannot select it. If the gift is recurring and the website user selects today's date as the start date for the first payment, the gift does not immediately send to Blackbaud CRM. It is processed according to the recurring gift schedule and the EFT workflow process in Blackbaud CRM. Also, when a website user includes a one-time item in the shopping cart on a Payment 2.0 part, Direct Debit is not an option from the **Payment Type** field on the web page.

To allow the donor to determine the frequency of the recurring gift on the donation form, select **General**. Donors can select to make a contribution every week, month, quarter, or year.

To define the recurring gift schedules donors can choose, select **Specific**.

a. Select “Weekly,” “Monthly,” “Quarterly,” or “Annually” as the frequency.
b. In the **On** field, select a day or date donors can choose to schedule the gift.

Tip: If a constituent donates a recurring gift and selects a start date that is not today’s date, the transaction downloads to Blackbaud CRM. However, the transaction is not sent to your bank merchant when the donor submits the recurring gift. The merchant receives the transaction from the batch output you send to your bank for processing from Blackbaud CRM. For more information about bank merchants, see the *Administration Guide*.

c. To add the frequency to the donation page, click **Add frequency**.
d. Select **Allow donor to enter ending date**, if donors can specify when the recurring gift ends.

Note: To add multiple frequency options to the donation form, enter each custom schedule and click **Add frequency** to add the new schedule to the list. The selections you make appear in the **Frequency** grid on the Donation Form part.

Design Donation Form: Donor Options

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **Donor Options**, select the options to make available to donors.
   a. To allow a company to donate, select **Allow corporate gifts**. When you select this checkbox, **This donation is on behalf of a company** appears on the donation form.
   b. To allow donors to give anonymously, select **Allow anonymous gifts**. When you select this, **I prefer to make this donation anonymously** appears on the donation form.
   c. To allow donors to enter comments on the donation form, select **Allow comments**.

      Information from the **Comments** field on the donation form downloads to a note on the Documentation tab of the revenue record in Blackbaud CRM.

d. To allow donors to provide matching gift company information, select **Allow matching gifts**. When you select this checkbox, **My company will match my gift** appears on the donation form. Donors can select the checkbox and enter the company name in the **Company** field. If you use *MatchFinder Online*, **Look it up** appears next to the checkbox. Visitors click the link to access *MatchFinder Online* and search for the company.

Note: Blackbaud hosts the *MatchFinder Online* search page separately; it is not a page on your Blackbaud Internet Solutions website. Therefore, the page does not inherit the styles your site uses by default. Blackbaud can apply styles from your Web Developers to the search page so it integrates with your website. To contact Support about this, create a case on Case Central.

Note: The program does not support matching gifts for pledges and recurring gifts.

2. To create a tribute section on the donation form, select **Allow tribute gifts (one-time gifts only)**.

Warning: If you allow for recurring gifts in addition to tribute gifts, on your Web page, and your online donor selects the **Recurring gift** option, the **Tribute** section does not display on the form. This prevents the donor from trying to set up a tribute with a recurring gift, which is not supported in Blackbaud CRM Constituent Record Management.

a. To allow the donor to enter the tribute information, select **General**.

   Select the checkbox for each tribute type to include in the tribute section. The tribute types listed are entries from the **Tribute Types** table in Blackbaud CRM.

b. To apply all gifts to a specific tribute, select **Specific**.

   To select a tribute, click **Tributes**. A search screen appears so you can search for the tribute. When you return to the Design tab, the **Tribute** field displays the tribute text and tribute type for the selected tribute. If you select a tribute that does not have a tributee associated with it, you cannot hide the tribute description.

c. To remove the **Description** field from the **Tribute** section on the donation form, select **Hide tribute description** field.

   If you select **Hide tribute description**, in the **Tribute Introductory Text** field on the Language tab, you can enter the text to appear at the beginning of the **Tribute** section on your donation form, such as “This gift is made in honor of someone special.”

d. If you select **General** so users can enter tributes themselves, you can select **Display tribute name fields as two fields (first/last name) to improve data entry**. When you select this checkbox, the **Tribute** section of the donation page displays **First name** and **Last name** fields so donors can enter information.

Note: If you do not select **Display tribute name fields as two fields (first/last name)**, the **Full name** field appears in the **Tribute** section of the donation form.

e. Select **Display acknowledgee name fields as two fields (first/last name)** to create separate name fields for the acknowledgee. When a donor selects **Mail a letter on my behalf** on the donation page, the **First name** and **Last name** fields appear so the donor can enter an acknowledgee.

Note: If you do not select **Display acknowledgee name fields as two fields (first/last name)**, the **Full name** field appears on the donation form when a donor selects **Mail a letter on my behalf**.

Note: When you include tribute information on your donor page, **Mail a letter on my behalf** automatically appears on the page. When a donor selects this checkbox, name and address fields appear for the donor to enter information for use in a tribute letter.

Design Donation Form: Designations and Giving Levels

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

Tip: For best practice information about donation forms, refer to Best Practices for Donation Forms.

1. Under **Designations**, click **Add designation** to choose each designation donors can associate with gifts. A row appears in the grid.
   a. In the **Designation** field, click the binoculars to select a designation to appear on the website.
   b. Select the **Default** checkbox for the designation that gifts apply to when donors do not select designations.

      To provide multiple designations for users to select from, click **Add designation** and repeat these steps to create another entry. When you do this, the **Support multiple designations** checkbox appears.
   c. To allow users to donate to multiple designations, select **Support multiple designations**.

      When you select this checkbox, **Add to Cart** appears on the donation page. Similar to purchasing items from a store, users select the designations to donate to.
2. Under **Impact statement**, select a note type to merge in the confirmation screen or acknowledgement email that informs the donor their gift is relevant to the designation. The available note types integrate from the Documentation tab for a designation in Blackbaud CRM.

   To merge the note in the confirmation screen or acknowledgement email, select merge fields in the HTML editor from the **Impact Statement** node. For more information about the HTML editor, see the *Program Basics Guide*.
3. Under **Giving levels**, to select a giving level for your donors, click **Add giving level**.

   When you include giving levels and select **Support multiple designations**, each donation made to a fund is considered for the giving level. For example, if a $500 donation is required for Gold status, and a donor donates $250 to the 2008 Annual Fund and $250 to the Building Equipment Fund, the donor does not receive Gold status. If the gift is one $500 donation to the 2008 Annual Fund, the donor receives the Gold giving level status.
   a. In the **Display name** field, enter the name of the giving level as it will appear on the website.
   b. In the **Amount** field, enter the gift amount for the giving level.
   c. To include a blank **$ Other** field on the Donation page, select **Allow other amount**.

Design Donation Form: Sources (Appeals), Donor Challenge, and Required Fields

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **Sources**, to select an appeal for the gift, click **Add source**. With this information, your organization can manage how donors learn about donating through the website.
   a. To include an appeal, click the binoculars in the **Appeal** column. The Appeal Search screen appears so you can select an appeal.

      When you select source information, a **How did you hear about our site** field appears on the donation page. In this field, users can select from the appeals you select in this step.

b. In the **Display name** field, enter the name of the appeal as it will appear on the website. By default, the text entered in the **Appeal Name** field on the appeal record defaults in the **Display name** field.

c. In the **Default** column, select the checkbox for the appeal to use when the user does not select an appeal.

d. To hide an appeal from the **How did you hear about our site** field, clear the checkbox for the appeal in the **Display** column.

When you do this, you can add source information to the end of a system generated URL in an email that navigates the recipient to your donation page. For example, create a link to your donation page in an email message. At the end of the system generated URL, add &source=camp. When the recipient clicks the link, the **How did you hear about our site** field does not appear on the page. The appeal stores the source information automatically based on the system generated URL.

Warning: To track source information this way, you must use a system generated URL. You cannot use unique URLs or friendly URLs created by a user.

The source information must include the appeal ID from Blackbaud CRM. For example, if the appeal ID in Blackbaud CRM is Annual2008, add &source=Annual2008 to the end of the system generated URL. If the appeal ID includes a space, replace the space with a %20. For example, if the appeal ID is CAMP LETTER add &source=CAMP%20LETTER.

If the **Display** checkbox is selected for the appeal and a user navigates to the donation page via a URL without source information, the **How did you hear about our site** field appears on the page.

e. To require users to select a source, select **Source is a required field**. If you select this checkbox, you must select the **Display** checkbox for at least one appeal.

To add additional appeals, click **Add source**. Another row appears in the grid for you to select another appeal.

f. To include a list of appeals sent to the donor, select **Include appeal history for donors**.

When you do this, options appear for you to select whether to include the entire list of appeals sent to the donor or limit the list by selecting a query. To include the entire appeal history, select **All**. To limit the appeal history, select **Specific**. Then, select a query of appeals to filter the list.

Tip: When you select **Include appeal history for donors**, the **How Did You Hear About Our Site** field on the donation page also includes any other appeals the donor received. For example, you select to include the Annual Appeal and the Scholarship Campaign Appeal under **Sources**. A donor received the Building Fund Appeal. When the donor logs in to your site, all three appeals appear in the **How Did You Hear About Our Site** field on the donation page.

2. Under **Donor challenge**, to encourage donors to make a donation in support of a major donor or corporate sponsor challenge, select **Include donor challenge**.

Note: A donor challenge is a fundraising tool to help increase support for a cause. A major donor or corporate sponsor pledges a large sum to challenge the organization to raise a specific amount from other donors. For more information about donor challenges, see the Blackbaud Internet Solutions *Fundraising Guide*.

a. In the **Enter an introduction for eligible donor challenge messages** field, enter text to inform users about the purpose of an eligible challenge match. For example, you can enter “Your gift may be eligible for the following donor challenges.”

b. In the HTML Editor box, enter text to inform users an eligible challenge match exists. You can format the content’s appearance and layout. For more information about the HTML editor, see the

Program Basics Guide.

When you include donor challenges on your website, the introduction appears once on the web page. The HTML editor content appears each time an eligible donor challenge exists. Multiple eligible donor challenges can exist in one of two ways.

- Multiple donor challenges exist when the designation has more than one donor challenge associated with it in Blackbaud CRM.

  For example, in Blackbaud CRM, the President's Challenge and the Dean's Challenge are associated with the Annual Fund. When a user selects Annual Fund on the web page, the HTML editor content appears twice. Merge fields populate for each instance to clarify the eligible donor matches to the user.

- Multiple donor challenges also exist when the Donation Form part allows for multiple designations and two or more of the designations have a donor challenge associated with them.

  For example, in Blackbaud CRM, the President's Challenge is associated with the Annual Fund and the Dean's Challenge is associated with the Building Fund. When a user selects to make a donation to the Annual Fund and Building Fund, the HTML editor content appears twice. Merge fields populate for each instance to clarify the eligible donor matches to the user.

3. Under **Required fields**, select the checkbox for each donor field to make required on the donation form. To ensure you download complete constituent information, we recommend that you make all of these fields required.

Design Donation Form: Additional, Spouse, and Attribute Information

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **Additional information**, select **Include name formats** so users can enter multiple name recognition preferences on the donation page. For example, users can enter a preferred name for your annual report and they can enter a preferred name for your alumni mailings.

Note: If you know a name format type exists in Blackbaud CRM but do not see it on this part, check the Settings tab in *Sites & settings* to make sure the name format type is available.

   a. In the **Include** column, select the checkbox for each name format type to include on the page.

   b. In the **Required** column, select the checkbox for each name format type you want to require.

   c. In the **Alternate caption** column, enter the text to display on the page. For example, you can enter "Annual report recognition."

   When a user submits a name format, it downloads to the Names tab on the constituent record.

2. Under **Spouse information**, select **Include spouse fields** so users can add or edit spouse information on the donation form. Spouse fields appear in a grid for you to select the information to appear on the page. To make a spouse field required, select the applicable checkbox in the **Required** column.

   If a user with existing spouse information in the database logs in to your site, the spouse information automatically appears on the donation page. If a user is not logged in, the spouse fields are blank. The user selects **I would like to provide information about my Spouse/Partner** to add new spouse information.

3. Under **Attributes**, select gift attributes to associate with the donation page.

Tip: The gift attributes that appear in this frame are created in Blackbaud CRM. After you process a donation transaction, the attributes you select appear on the Attributes tab of a revenue record.

4. In the **Display** column, select the checkbox beside the gift attribute to associate with the part. To make the attributes required, select the checkbox in the **Required** column. To change the text of the attribute on the donation page, enter the text to display in the **Caption** field.

Note: If you know an attribute exists in Blackbaud CRM but do not see it online, check the Settings tab in *Sites & settings* to make sure the attribute is available.

Design Donation Form: Payments and Pledges

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **Payment setup**, select the payment options for website users.
    a. To allow website users to pay for multiple transactions at one time, select **Use payment part**. The **Payment** frame appears. In the **Payment page** field, select the web page to use to process donations. The Payment part on the selected page determines the payment methods and merchant account used to process donations. For information about the Payment part, see Payment on page 103.

    In the box, enter the text to appear on the payment page after a donation is added. To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

    b. To require website users to pay for donations one at a time, select **Proceed directly to payment**. Additional frames appear for you to select merchant account, payment type, and confirmation screen information.
2. In the **Merchant account** field, select the merchant account to use to process credit card transactions received through the donation form, such as your organization's IATS account. The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.
3. Select the payment types donors can use to contribute to your organization.

Note: Donation forms that allow pledge payments must include credit card or direct debit as a payment method. For information about how to accept pledge payments, see Transaction Manager on page 168.

4. Select options for the donation summary that appears after a user submits a donation.
    a. To use the program's default confirmation screen, select **Use default confirmation screen**.
    b. To customize a confirmation screen, select **Use custom confirmation screen**. The HTML editor appears with the default confirmation screen. You can edit it as necessary.

    In the box, edit the content for the donation summary. To format the appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

Tip: Customizations for the confirmation screen remain even if you select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor for you to customize again.

5. Under **Pledge payment**, select whether to display information about the next installment on the pledge payment donation form.

   When donors access their giving history information with the Transaction Manager part, certain pledges with an outstanding balance include a link to the selected Donation Form page. Donors can use this link to enter a pledge payment. For information about how to link a page that includes a Donation Form part to the Transaction Manager part so donors can pay outstanding pledges, see Transaction Manager on page 168.

Note: If your organization accepts electronic fund transfer (EFT) payments and the donor selects to pay a pledge in installments with a credit card or debit card at the time the pledge is created, the link to the donation form page does not appear. The link also does not appear if the pledge currently has a payment pending or if the pledge balance is zero.

Note: If a donor enters an amount greater than the installment amount due, the program automatically applies the overpayment to the next scheduled installment. If the a donor enters an amount greater than the total remaining pledge amount due, the program automatically creates a new gift with the overpayment.

- Select **Show next installment due date for pledges** to include information about the next scheduled installment. When you select this checkbox, a donor who selects to pay an outstanding pledge from the Transaction Manager can view the **Current balance**, **Amount due**, and **Due date** fields on the donation form. If you clear this checkbox, these fields do not appear.
- In the **Minimum pledge payment amount** field, enter the minimum amount a donor can pay toward an outstanding pledge. Enter "0" or leave this field blank to allow donors to enter any amount.

Design Donation Form: eCards

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **eCard options**, to associate an eCard with the donation web page, select **Include eCards**. For more information about eCards, see eCards on page 48.

Note: When you edit a Donation Form part, click **eCard Email** to access the eCard design screen. You can use the default text provided or enter different text.

2. Click **Next**. The Acknowledgement Email screen appears.
3. Create an acknowledgement email for website users who use the donation form to donate to your organization. You can use the default text provided or enter different text.

Note: To include eReceipt information in an acknowledgement, use the **eReceipt Number** and **eReceipt Download URL** merge fields. If you include the **eReceipt Number** field, a receipt number is assigned to the donation. This number downloads to Blackbaud CRM. If you include the **eReceipt Download URL** field, the eReceipt contains a URL to a saved copy of the eReceipt PDF. For information about how to design the eReceipt, see Design Donation Form: eReceipts on page 48.

Tip: To access the Acknowledgement Email screen, click **Acknowledgement Email** when you edit a Donation

Form part. For information about how to design an acknowledgement, see the *Email Guide*.

4. To save the email, click **Save**. You return to the Edit Part screen.
5. Click **Save**. You return to *Parts*.

   If receipt stack and number information exists for eReceipts on the Settings tab in *Sites & settings*, **Next** appears. To create and design the eReceipt for the part, click **Next**.

Design Donation Form: eReceipts

After you create and design the eReceipt, a **Click here to view your eReceipt** link appears at the bottom of the donation confirmation screen. To view and print a PDF of the eReceipt, donors click this link.

1. From the Parts screen, select the Donation Form part for which you want to design an eReceipt.
2. In the **Action** column, click **Click here to edit this part**. The Edit Part screen appears displaying the Design tab.
3. Click **eReceipt**. The eReceipt design screen appears.

Note: To create eReceipts, you must establish the receipt stack and number information in *Sites & settings*. For more information, see the *Administration Guide*.

4. In the **eReceipt Options** frame, select whether to create an eReceipt for a **Credit card** or **Debit card**. You can create the eReceipt for both payment methods.
5. To mark the gift as receipted when you download it to Blackbaud CRM, select the **Mark gift as receipted in Blackbaud CRM** checkbox.

   When you select this checkbox, the receipt number from Blackbaud Internet Solutions defaults in the **Receipt no.** field on the gift record in Blackbaud CRM. Also, the URL for a copy of the eReceipt PDF defaults as a gift attribute.

Warning: The program does not create a receipt number unless you include the **eReceipt Number** or **eReceipt Download URL** merge fields when you include eReceipt information in the acknowledgement.

6. In the **eReceipt Content** frame, enter the text to appear on the eReceipt. If you include the **eReceipt Number** field, the eReceipt contains the receipt number for the donation. To format the appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.
7. To preview the eReceipt, click **Preview PDF**.
8. To save the eReceipt, click **Save**. You return to the Edit Part screen.
9. Click **Save**. You return to *Parts*.

eCards

With the eCards part, your organization can enable website users to browse, personalize, and send eCards to others from your website. An eCard is an electronic greeting card that contains content from a selected template. Your users can send an eCard as an email message or as a printed copy in the mail. eCards can promote your organization and drive new visitors to your website to help build your online community. You can offer eCards as a free service for your website users or as an incentive to donate to your organization.

On your website, the eCards part includes multiple screens to step the user through the process to select, personalize, and send an eCard.

- **Choose** – On this screen, the website user selects the template to use to create an eCard. When you design the

eCards part, you select the available eCard templates and how they appear on your website. Before you can add a template to the eCards part, the template must be available in *eCard Templates*. For information about *eCard Templates*, see the *Email Guide*.

- **Confirm** – After the website user selects an eCard template, this screen displays a preview of the selected template to verify it is the one to use to create an eCard. The website user can select to continue to create the eCard or return to the previous screen to select another template.

Note: When you design the eCard template, you can use merge fields to create additional content to appear when the preview of the template appears. For example, you can display a watermark you create over the preview of the eCard to prevent users who attempt to copy and send the free preview of the eCard to avoid a donation.

- **Personalize** – On this screen, the website user enters the recipients and email addresses to receive the eCard. The user can also enter a personal message for the recipients, select whether to send or print the eCard, and request to receive copies of the eCard email messages the program sends to each recipient.
- **Preview** – On this screen, the website user can view a preview of the personalized eCard before the program sends it. The website user can continue to send the eCard or return to the previous screen to adjust its personalization. From this screen, the user can print or generate a portable document format (*.pdf) file of the eCard preview. If the user logged in to your website and you do not require a donation to send an eCard, the website user also sends the eCard from this screen.
- **Send** – If the user is anonymous or did not log in to your website, this screen appears. To help prevent automated abuse of your website, the Send screen provides a completely automated public turing test to tell computers and humans apart (CAPTCHA).

Note: The eCards part requires a completely automated public turing test to tell computers and humans apart (CAPTCHA). Visit http://recaptcha.net/ to obtain free CAPTCHA functionality with *reCAPTCHA*. When you sign up for *reCAPTCHA*, you receive public and private keys, which your system administrator must enter on the Settings tab in *Sites & settings*. Without CAPTCHA functionality, you leave your website vulnerable to automated abuse. For more information, see the *Administration Guide*.

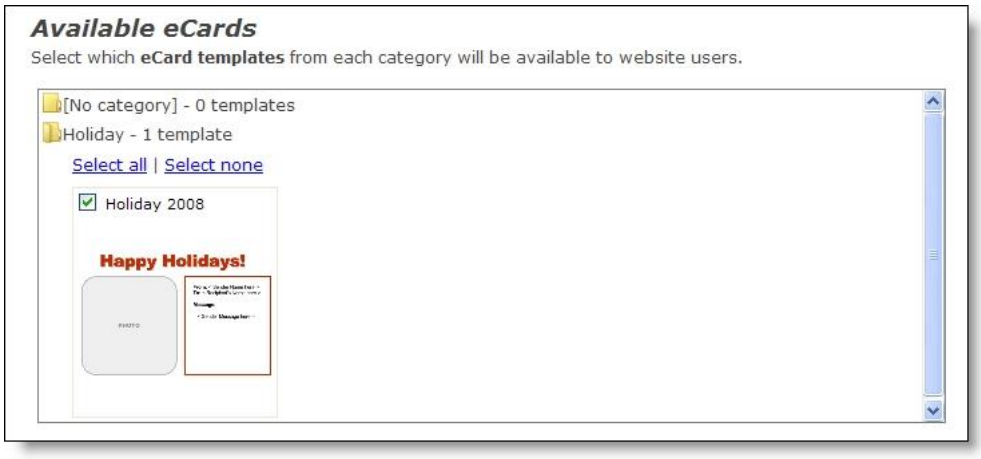
- **Donation** – If you require a donation to send an eCard, this screen appears. On this screen, the website user enters information about the donation. After the website user completes the donation, the confirmation screen you select when you design the eCards part appears.
- **Finish** – If you do not require a donation to send an eCard, this screen appears to thank the user and confirm the program sent the eCard. From this screen, the user can select to print or generate a *.pdf file of the sent eCard. The user can also select to create another eCard.

Tip: To create reports about the eCards your users send through your website, design a Report (Email) part. For information about the Report (Email) part, see Email Reports on page 53.

Design eCards

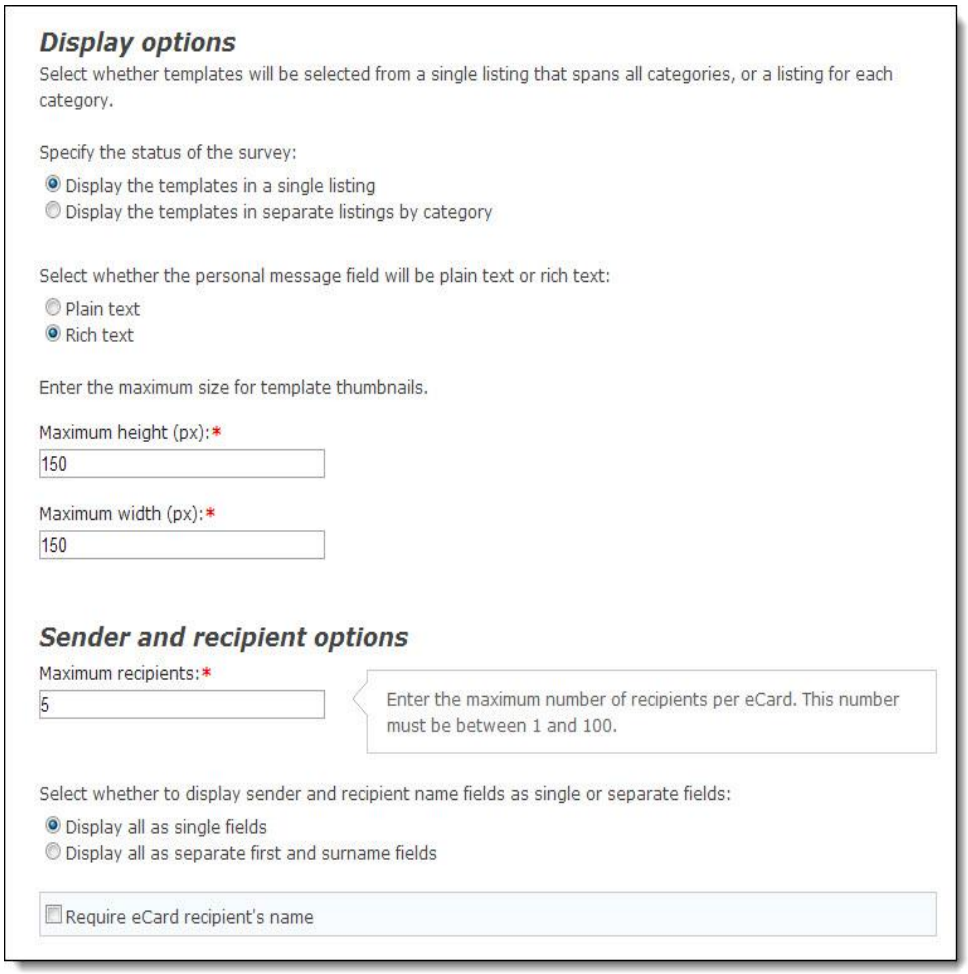
For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Available eCards**, browse the eCard template categories in *eCard Templates* and select the templates to make available to website users. The templates you select here appear on the Choose screen of the eCards part on your website.



Note: *eCard Templates* provides the eCard templates that appear under **Available eCards**. To add a template to an eCards part, the template must be in *eCards Templates*. For information about how to create an eCard template in *eCard Templates*, see the *Email Guide*.

2. Under **Display options**, enter how the selected templates appear on the Choose screen of the eCards part on your website.



a. Select how the selected eCard templates appear on the part's Choose screen on your website.

   To display all the eCard templates together, select **Display the templates in a single listing**.

   To display the eCard templates by category, select **Display the templates in separate listings by category**. When you select this option, your website users can browse for a template by its category.

b. Select whether the personal message field on the part's Personalize screen on your website generates plain text or rich text.

Note: All email clients can easily read the plain text format, but it does not allow users to adjust the text's color, font, or format. With rich text, users can adjust the text's format and embed pictures and links, but not all email clients can easily read the rich text format. Email clients that do not support the rich text format convert the text to the plain text format.

c. In the **Maximum height** and **Maximum width** fields, enter the maximum size, in pixels, of the thumbnail preview image of each template.

3. Under **Sender and recipient options**, you determine the maximum number of eCard recipients and whether to provide first and last name fields for senders and recipients.

   a. In the **Maximum recipients** field, enter the maximum number of recipients for an eCard. You can allow website users to send eCards to a maximum of 100 recipients.

   b. To provide one name field for the sender and one name field for recipients, select **Display all as single fields**. To provide **First name** and **Last name** fields for both the sender and recipient, select **Display all as separate first and last name fields**.

   c. To require website users to enter first names for eCard recipients so merge fields are not blank, select **Require eCard recipient's name**.

4. To require website users to make a donation to send an eCard, select **Require a donation**. The options for the Donation Form part appear. For information about these options, see Donation Form on page 39.

5. Under **Donation options**, select **Require a donation** to associate gift attributes with eCards for the part, under **eCard Attributes**, select attributes in the **Send date**, **Recipient first name**, and **Recipient last name** fields. Each field creates its own attribute in Blackbaud CRM. Website users do not view these attributes on the donation page.

Warning: If your eCard allows for multiple recipients and you select an attribute for the **Recipient first name** and **Recipient last name** fields, only the first recipient name information in the recipient list downloads to Blackbaud CRM. If the user enters one word for a recipient name, it downloads as the recipient first name attribute.

6. When website users send an eCard, the recipient receives an email message with the personalized content from the selected template or a link to a web page that contains the content. To create the email message for the eCards this part generates, click **eCard Email**. The eCard Email screen appears.

   For information about how to create an eCard email message, see the *Email Guide*.

7. To customize the messages and labels that appear for the eCards part on your website, select the Language tab. For information about the Language tab, see Language Tab on page 10.

8. Click **Save**. You return to *Parts*.

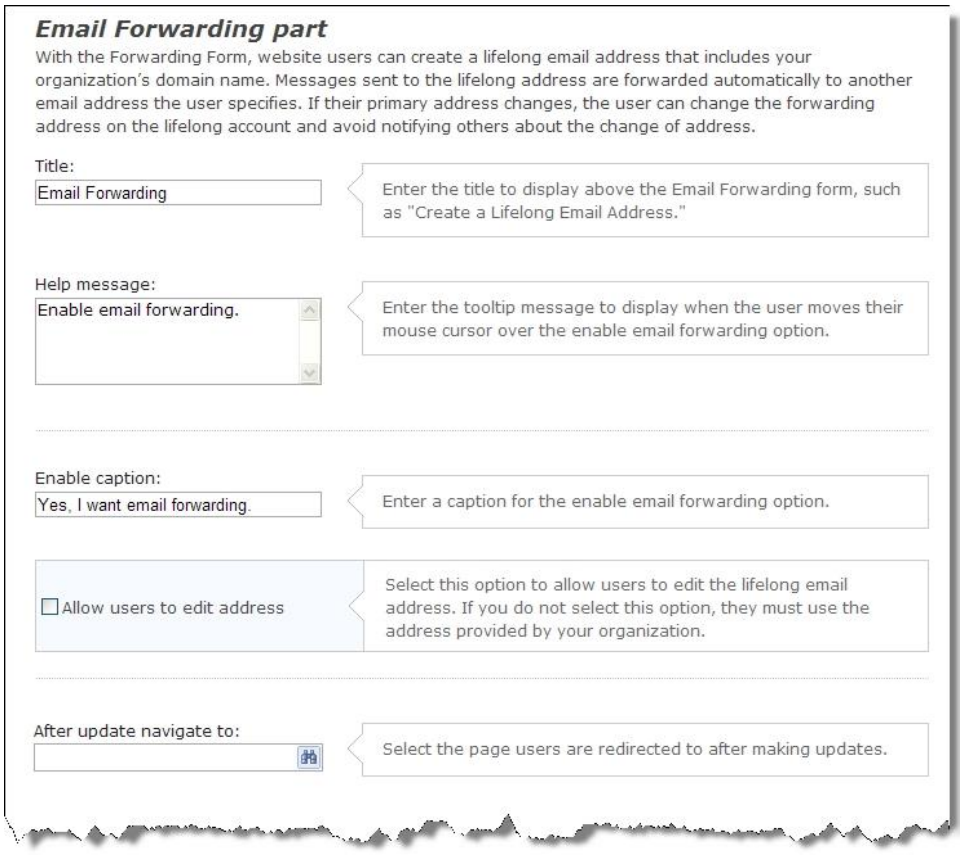
Email Forwarding Form

With the Email Forwarding Form part, website users can establish an email address that never changes. With this part, users can sign up and create a lifelong email address that is forwarded to an address they select. If their address changes, they can change the forwarding address and other users never know and do not need to keep up with changes. To configure your organization's email forwarding email domain, review the Technical Requirements document provided by Blackbaud Professional Services.

Design Email Forwarding Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Title** field, enter a name to identify the Email Forwarding form.



2. In the **Help message** field, enter the tooltip message to display when users move their mouse cursors over the enable email forwarding option.
3. In the **Enable caption** field, enter the text to appear on the website for the checkbox users can select to enable email forwarding. By default, "Yes, I want email forwarding." appears.
4. To allow users to create their own forwardable email addresses, select **Allow users to edit address**. When a user edits an email forwarding address, the program creates a Profile Update transaction for the user.

5. In the **After update navigate to** field, browse to the page you want to appear for website users after they update their email forwarding. If you do not select a page, the home page from the Settings tab in *Sites & settings* appears by default.
6. Click **Save**. You return to *Parts*.

Email Reports

Using the Report (Email) part, you can create reports about email sent through the website.

Email Revenue Summary — The Email Revenue Summary displays the amount of donations collected through a link in the email to a donation page. Website users can filter the report results by date range, message type, and revenue type.

Email Activity Report — The Email Activity Report displays details for each email sent including the email title, type, sender's name, and date sent. Other details include the number of opened and bounced emails, and the number of page visits generated by each email. The report also contains a bar graph that shows the total number of opened, bounced emails, and page visits for all emails included in the report. Website users can filter the report results by email type, date range, and action.

Note: After you add the part to a page and send emails through the website, the report automatically generates results when you access the page.

This table explains the items included in the Email Activity Report.

Type	Type of message sent — Email, Acknowledgement, Newsletter, Chapter, Personal Page, Campaign Appeals, and Scheduled
Sent	Number of emails sent
Opened	Number of emails sent that were tracked as opened
Bounced	Number of emails sent that were not delivered successfully
Page Visits	Number of web page visits generated by a link in the email

▸ Design Email Reports

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Report Type** field, select the type of report to create. Select **Email Revenue Summary** or **Email Activity Report**.

   To view a pop-up preview of the report, click on the report type.
2. In the **Report Title** field, select the title to use for the report.
   - To use the report's name for the title, select **Default**.
   - To enter a custom report title, select **Other** and enter the title in the field.
3. To display the report title above the report, select **Show Report Title**.
4. To save the report, click **Save and Close**. You return to the Report (Email) design screen.
5. Click **Save**. You return to *Parts*.

Event Calendar

You can use the Event Calendar part to add a calendar to your website. Event Calendar parts can:

- Act as standalone calendars. For example, the academic departments at your school manage their own calendars on your website. Each department can create and maintain a separate Event Calendar part for its calendar.
- Work as sub-calendars that feed events to a larger organizational calendar. For example, your website has a main calendar that lists events for all areas of the school. With the Event Calendar Group part, each departmental calendar can feed events from their Event Calendar parts into the main calendar for the school. For more information about Event Calendar Groups, see Event Calendar Group on page 58.

You can use Event Calendar part properties to manage who views and manages each calendar. For example, a school may have a sub-calendar of faculty events that only users assigned to Administrator or Faculty roles can view or edit. You can also use Event Categories to manage the types of events added to the calendar and who manages them. For example, a soccer calendar may have categories such as Registration, Practice, and Games, and only users in the Coaches role have rights to add, edit, or delete events in these categories.

Calendar managers can create recurring events. When you edit recurring events, the manager can select whether to change all occurrences in the series, only the selected occurrence, or all future occurrences in the series including the selected occurrence. When you change an occurrence of an event, you cannot later make that occurrence part of a recurring series.

Calendar managers can select a time zone for the event. If an event does not have a time zone, the logged-in user's time zone setting determines the date and time displayed for the event. For anonymous users or any user who does not have a time zone specified, the event displays the time and date based on the system's setting. If your website users are all in the same time zone, we recommend managers leave the time zone field blank. If your website users are in multiple time zones, we recommend you set the time zone to the user's setting.

When you enter an address for the event, you can select to include a *Google* or *Yahoo!* map link to the location. On the Events screen, you can click **Preview map** under **Event Information** to verify that the location you entered is correct. Calendar managers can also use the HTML editor to add pictures and hyperlinks to the event listing and to format text.

To cancel an event, a manager can select **Mark Canceled**. In the List View and Calendar Highlights, the event title is appended with "- Canceled." In the Calendar View, the event name is struck through. For the calendar weblog, "Update" or "Removed" is added to the title, and readers who subscribe to the calendar weblog receive an updated calendar event posting through their RSS feed.

Website users have four views of the calendar: the Calendar View, the List View, Published Events, and Event Details View.

- The Calendar View displays a large monthly calendar. Dates with scheduled events are colored and list the events that occur that day. Users can click **Filter Events** to customize the categories of events that appear. Event names are hyperlinked so users can click them to read more information about the event. In this view, icons indicate whether an event is recurring, occurs in a time zone, or lasts longer than one day.
- The List View displays a list of all the events scheduled for the selected period of time. Event names are hyperlinked so users can click them to read more information about the event. Users can filter events by date or click **Filter Events** to select the types of events to view.
- If you enable the RSS (Really Simple Syndication) Event Publishing capabilities, calendar managers can post "stories" in a weblog form with details about upcoming events. Site users click **Published Events** to view the calendar weblog. Posted events also appear in site search results. Website users can subscribe to the RSS feed so they receive updates in their RSS reader about upcoming events.

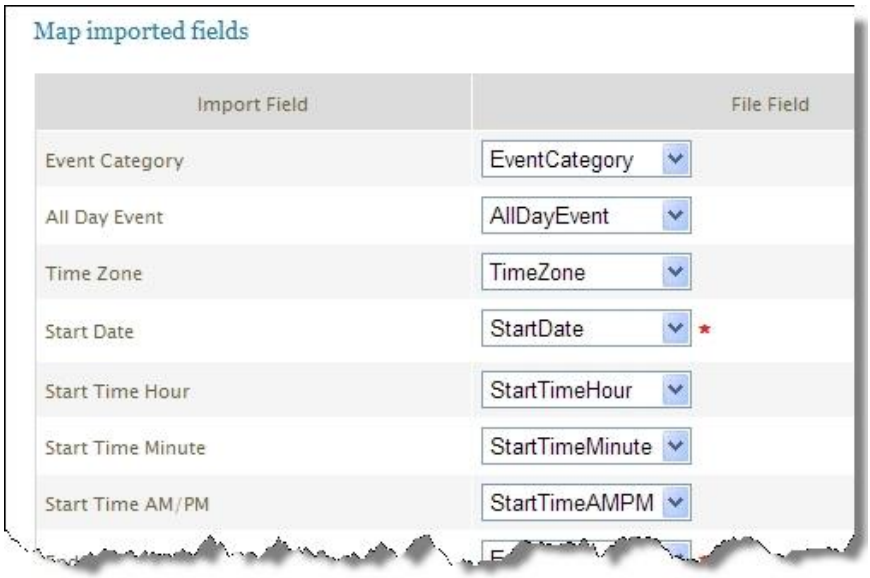
- The Event Details View is the page that appears when a website user clicks on an event in the Calendar View or List View. It displays the details for the selected event.

In the Calendar View, List View, and the Event Details View, users can click **Print View** to open a window displaying the printer-friendly version of the calendar or event.

Also in the Calendar View, List View, and the Event Details View, users can click **Export as iCalendar** to export events in the iCalendar format (*.ics) so they can be opened in other calendar programs, such as Microsoft *Outlook* or Apple *iCal*. The export file includes only the events appearing currently in the calendar; if the calendar is filtered, filtered out events are not exported. If an event is time zone specific but not recurring, the event time is converted to UTC time in the export file. If an event is time zone specific and recurring, the export file includes the event time zone as well as the daylight savings rules for that time zone. The export file includes any *.html event descriptions but does not include event graphics. In the Event Details View, additional buttons appear so users can add the single event to their *Windows Live*, *Google*, or *Yahoo!* calendars.

Note: When using a version of Microsoft *Outlook* older than version 7, users should save the exported *.ics file to their local machine and use the **Import an iCalendar file** function in *Outlook*. If users with an older version attempt to import by double-clicking the saved *.ics file, it imports only the first event and discards any others. Users with *Outlook 7* can double-click the saved *.ics file to import all events with no issues.

In the Calendar View and List View, users can click **Import Events** to add multiple events to the calendar at one time. On the Select import file screen, in the **File** field, users browse to a *.csv file that contains header columns and the values to import. Only the **Start Date**, **End Date**, and **Title** fields are required, but the import file can include values for all fields that appear on the Add Event screen, except **Recurrence**.



After selecting the import file, the user must map the import fields to those in the program. However, if the *.csv file's column headers use the same names as the corresponding fields in Blackbaud Internet Solutions, the program automatically maps the import file fields to the event fields.

Note: You can import data for all event calendar fields, except **Recurrence**. After you import the *.csv file, you can manually set an event's recurrence.

Use the table below to set up *.csv files with values the program can automatically map to the corresponding event fields in Blackbaud Internet Solutions.

Field Name	Field Values
Event Category	Enter a category for the event. Your entry must match a category you

Field Name	Field Values
	previously created on the Code Tables page in *Administration*.
All Day Event	Enter "Yes" or "No," "True" or "False" to indicate whether the event will last the entire day.
Time Zone	Enter the geographical location associated with the time zone where the event occurs, such as "Chicago" or "Los Angeles," so the start and end times accurately reflect the scheduled time of the event for a viewer in a different time zone.
Start Date	Enter the start date in any standard date format. For example, you can enter January 1, 2011 as "01/01/11" or "1/1/2011." This field is always required.
Start Time Hour	Enter a whole number for the hour. If you entered "No" or "False" in the **All Day Event** column, this field is required.
Start Time Minute	Enter "0," "15," "30," or "45." When you manually create an event in Blackbaud Internet Solutions, you must enter this time in fifteen-minute increments. If you entered "No" or "False" in the **All Day Event** column, this field is required.
Start Time AM/PM	Enter "AM" or "PM." If you entered "No" or "False" in the **All Day Event** column, this field is required.
End Date	Enter the end date in any standard date format. This field is always required.
End Time Hour	Enter a whole number for the hour. If you entered "No" or "False" in the **All Day Event** column, this field is required.
End Time Minute	Enter "0," "15," "30," or "45." When you manually create an event in Blackbaud Internet Solutions, you must enter this time in fifteen-minute increments. If you entered "No" or "False" in the **All Day Event** column, this field is required.
End Time AM/PM	Enter "AM" or "PM." If you entered "No" or "False" in the **All Day Event** column, this field is required.
Title	Enter the name of the event. This field is always required.
Subtitle	If the event has a subtitle, enter this information.
Location	Enter the address for the event. If you plan to include a *Google* or *Yahoo!* map link, enter the street address, state, and zip code so the program includes accurate directions to the event's location.
Map Link	If you entered a location for the event, you can enter "Google" or "Yahoo" as the web mapping service. After you import the event, a **Map** link appears next to the location in the event's details.
Details	Enter information about the event.
Fees	Enter the fees associated with the event as a number ($10.00) or as text (ten dollars).
Contact Info	Enter a contact name or email address.
More Info URL	Enter the URL that includes additional information about the event. This entry appears as a **More info** link when you open the event from the calendar.

▸ Design Event Calendar

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General options**, enter a name for the calendar in the **Calendar title** field.

2. Under **Default display**, select the default view of the calendar. You can select **Calendar view** or **List view**. Website users can always select a different view when they open the calendar.
3. Under **Uncategorized events management rights**, select the roles with rights to manage any events not associated with a category.
4. Under **Event Categories**, select the event categories to associate with the calendar. After you add a category, click **Assign rights to the category**. The Event Category Security screen appears so you can assign rights to users and roles for the event category. For example, a Soccer calendar may have the Registration, Practice, and Games categories, and only users in the Coaches role can add, edit, or delete events in these categories. Also, when the coach adds a new event, they can assign its category from those you select for the calendar. For example, the coach specifies whether the new event is Registration, Practice, or Games. You can use these categories to filter the types of events that appear in calendar groups and calendar highlights. For example, you can set a calendar highlights part to display only events included in the Game category. For information about how to add event categories, see the *Administration Guide*.
5. To include a weblog for the Event Calendar part, select **Enable RSS**. Additional fields for the weblog appear.
    a. In the **Date format** field under **Appearance**, select a date format for the weblog.
    b. Under **RSS publishing properties**, in the **Title** field, enter a title for the weblog.
    c. In the **Link URL** field, enter a website address news readers can use to link to the calendar weblog. Also, if your website has a News Reader part, add this link to your news reader so it displays new events when they are posted. For more information about the News Reader part, see News Reader on page 89.
    d. In the **Description** field, enter a description for news readers about the types of events posted on the calendar. For example, if your organization supports the environment, enter "Upcoming Local and National Events Supporting the Environment."
    e. In the **Copyright** field, enter a copyright notice for the weblog, if you have one.
    f. In the **Editor's email** field, enter the email address for the person responsible for the content of calendar postings.
    g. To approve weblog posts before they appear on your site, select **Moderated**.
6. To add a picture to the calendar weblog, click **Select Image** under **Image properties**. The Select Image from Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.
7. In the **Link URL** field, enter the web address to open when a user clicks the image. The link can access another page on your site or an outside website.
8. Under **Security rights**, define the roles with post and manage rights for the published events.
    a. In the **Post** column, select the checkbox to assign post rights for users and roles allowed to post to the weblog. This does not include rights to edit or delete postings.

Note: If the list is marked **Moderated**, posts are pending until a user with Manage rights approves them. A user with Post rights views his or her pending posts, but not those of other Post users. Only users with Manage rights view all pending posts.

    b. In the **Manage** column, select the checkbox to assign manage rights for users and roles allowed to add, edit, and delete weblog postings. If the list is marked **Moderated**, this grants rights to approve postings.

c. To include additional users and roles, select **Add users and roles**.

9. Click **Save**. You return to *Parts*.

Event Calendar Group

You can use the Event Calendar Group part to create a top-level calendar that receives events from smaller sub-calendars. For example, the academic departments, athletic department, and alumni association at your school each maintain a calendar on your website. Your website also has a main calendar that includes events for all areas of the school. In this scenario, the departments and alumni association create their own calendars with the Event Calendar part. You can then create an Event Calendar group for the main school calendar and assign the department and alumni calendars as sub-calendars of that group. For more information about the Event Calendar part, see Event Calendar on page 54.

Design Event Calendar Group

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in **Calendar group title** field, enter a name for the calendar group.
2. Under **Pick source calendars**, select the calendars to include in this group. You can choose from any calendars created with the Event Calendar part.
   a. In the **Display** column, select each calendar to include in the calendar group.
   b. In the **Color** column, select a color for events included in the selected calendar. When a user views the calendar group in the List View or the Calendar View, hyperlinks to events included in the selected calendar appear in the selected color. For example, if you select red for the soccer calendar, all hyperlinks to soccer events are red.
   c. In the **Icon** column, select an icon for events included in the selected calendar. The program resizes the selected image to 16x16 pixels automatically. Icons appear next to the hyperlinks to events included in the selected calendar. For example, if you select a soccer ball for the soccer calendar, a soccer ball icon appears next to all hyperlinks to soccer events in the calendar group.
3. Under **Pick category filters**, select the categories of events to use in the calendar group. For example, if this is a school's main athletics calendar, you could include only the Game category. This would filter out any events included in other categories from the selected calendars, such as practices or scrimmages. You create Event Calendar categories on the Code Tables page in *Administration*.
4. Click **Save**. You return to *Parts*.

Event Calendar Highlights

You can use the Event Calendar Highlights part to display short descriptions of upcoming or prior events on any web page. The part displays event names, dates, and times, and it may also include links to the event calendars where users can view more details about the events. You can select the calendars that feed into the highlights and when to include the events.

Design Event Calendar Highlights

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

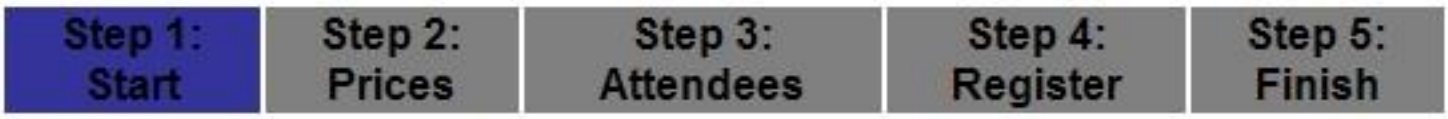
1. From the Design tab, under **Pick source calendars**, select the calendars to include in the calendar highlights. You can choose from any calendars created with Event Calendar parts.
    a. In the **Display** column, select each calendar to include in the calendar highlights.
    b. In the **Color** column, select a color for events included in the selected calendar. When a website user views the highlights, the titles of events from the selected calendar appear in the selected color. For example, if you select red for the soccer calendar, the titles of all soccer events are red.
    c. In the **Icon** column, select an icon for events included in the selected calendar. The program resizes the selected image to 16x16 pixels automatically. Icons appear next to the event titles. For example, if you select a soccer ball for the soccer calendar, a soccer ball icon appears next the titles of soccer events in the calendar highlights.
2. Under **Pick category filters**, select the categories of events to use in the calendar highlights. For example, if this is the school's main athletics calendar, you could include only the Game category. This would filter out any events included in other categories from the selected calendars, such as practices or scrimmages. You create Event Calendar categories on the Code Tables page in *Administration*.
3. To include a section that displays highlights of upcoming events, under **Additional options**, select **Show upcoming events**.
    a. In the **Upcoming events title** field, enter a title for the upcoming events section.
    b. In the **Show next** field, select the period of time to include events in the display, such as events that occur within the next 5 days or next month.
4. To include a section that displays highlights of previous events, select **Show recent events**.
    a. In the **Recent events title** field, enter a title for the recent events section.
    b. In the **Show last** field, select the period of time to include events in the display, such as events that occurred within the previous 5 days or previous month.
5. To include the **Print View** button on the highlights display, select **Show print view button**. When website users click **Print View**, a window appears displaying a printer-friendly version of the event highlights.
6. In the **URL for more information** field, enter a URL to another page on the website or to a separate site that contains more information about events. If you add a URL, **More Information** appears on your website.
7. Click **Save**. You return to *Parts*.

Event Registration Form

To allow website users to register for events online, you can create event registration forms. You can link your online and offline events and download online registration information directly to event records.

You can set up the event registration form so that when members register for events online, their relationships from Blackbaud CRM appear as available participants, making online registration easy for members and adding personal details to their registration forms.

When the Event Registration Form part is added to a web page, the registration options appear on separate pages. You can include a status bar for the user to view their progress while they complete the event registration process.



- **Step 1: Start** — This is the Event Selection page. Information about each event appears, including the description, date, and time of the event. By default, the website user selects their events on this page and enters the registration quantity and pricing information on another page. If your Event Registration form includes only a few events, you can exclude the first step of registration to minimize steps for your registrants. When you exclude the first step, the progress indicator displays the event registration as four steps: Prices, Attendees, Register, and Finish. In a four step registration, the user selects the events and enters the quantities of event units as part of the Prices step.
- **Step 2: Prices** — This is the Quantity and Pricing page. The pricing options and units for the selected events appears. On this page, the website user enters the quantities of event units to register. If you exclude the first step of registration, the user selects their events on this step too.
- **Step 3: Attendees** — This is the Attendees page. On this page, the website user enters who will attend the selected events and selects any registrant attributes you add to the Event Registration form.
- **Step 4: Register** — This is the Payment page. A summary of the event registration appears. On this page, the website user verifies the registration options selected are correct and enters any billing and payment information.
- **Step 5: Finish** — This is the Confirmation page. A summary of the billing and payment information appears.

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or Blackbaud CRM, select **Test mode** on the Properties tab. For example, you can complete the fields on an Event Registration Form to ensure the confirmation page is styled and working properly. Although you submit the registration and receive a confirmation, a transaction does not appear on the Web Transactions page in Blackbaud CRM. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

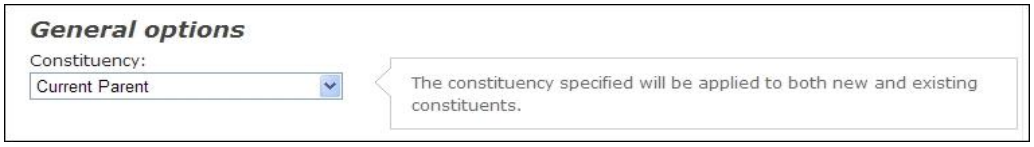
Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

Design Event Registration Form

Tip: For optimal performance, include only one Event Registration Form part for each web page.

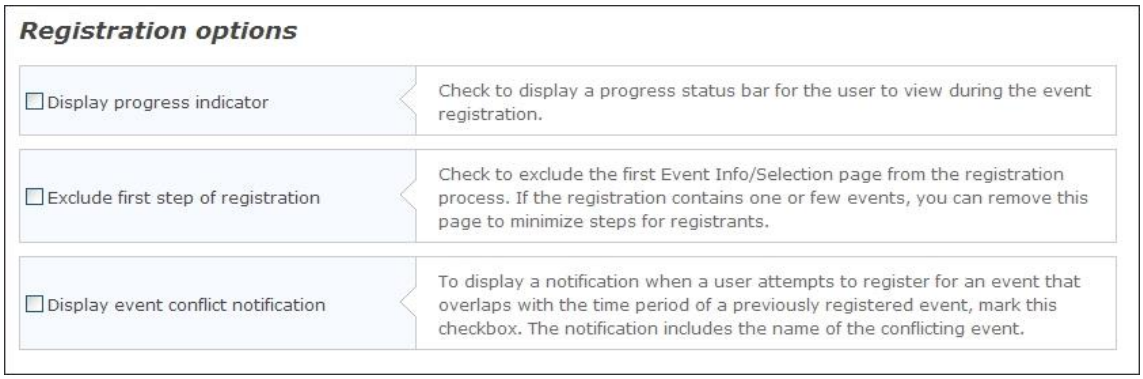
For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General Options**, select a constituency to apply to registrants. For more information about constituencies, see the *Program Basics Guide*.



Note: If a registrant already exists in the database, the constituent record updates to include gift and event data from the downloaded event.

2. Under **Registration Options**, select **Display progress indicator** to display a progress status bar for the user to view during the event registration.

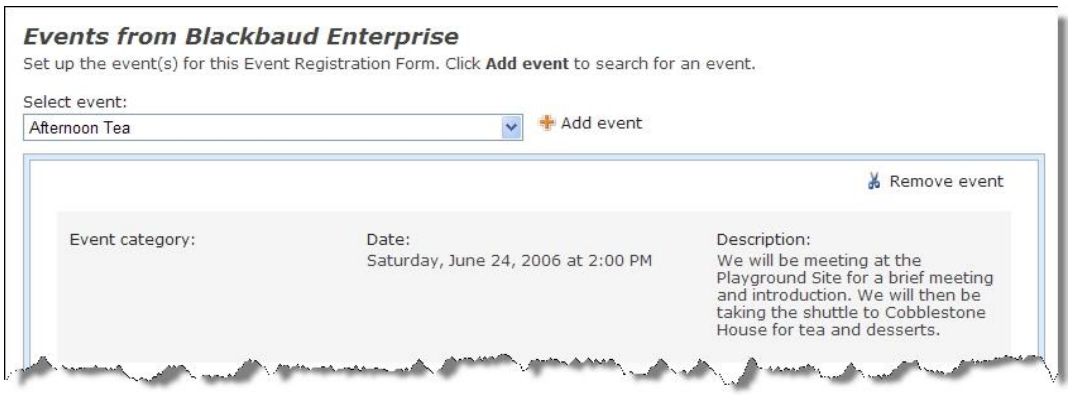


3. To allow the website user to select both events and registration options on one page, select **Exclude first step of registration**. If you do not select this option, a five step progress indicator appears at the top of the event registration form and the website user selects the events to register for on one page and enters the registration quantity and pricing information on another page.

Tip: If you select **Exclude first step of registration**, Step 1: Start does not appear on the progress indicator. The progress indicator displays the event registration as four steps: Prices, Attendees, Register, and Finish. In a four step registration, the user selects the events and enters the quantities of event units as part of the Prices step.

Note: If your Event Registration form includes one or few events, we recommend you select **Exclude first step of registration** to minimize steps for your registrants. If your Event Registration form includes multiple events, a second event information and selection page may be helpful to your website users.

4. To display a notification message to users when they attempt to register for events with overlapping start and end times, select **Display event conflict notification**. Users can still register for the conflicting events, but a notification will be displayed.
5. Under **Required fields**, select the checkbox for each donor field to make required on the event registration form. To ensure you download complete constituent information, we recommend that you make all these fields required.
6. Under **Captions**, for each button or label listed, enter the text to appear on the Event Registration form.
7. Under **Events from Blackbaud CRM**, select the event to use.

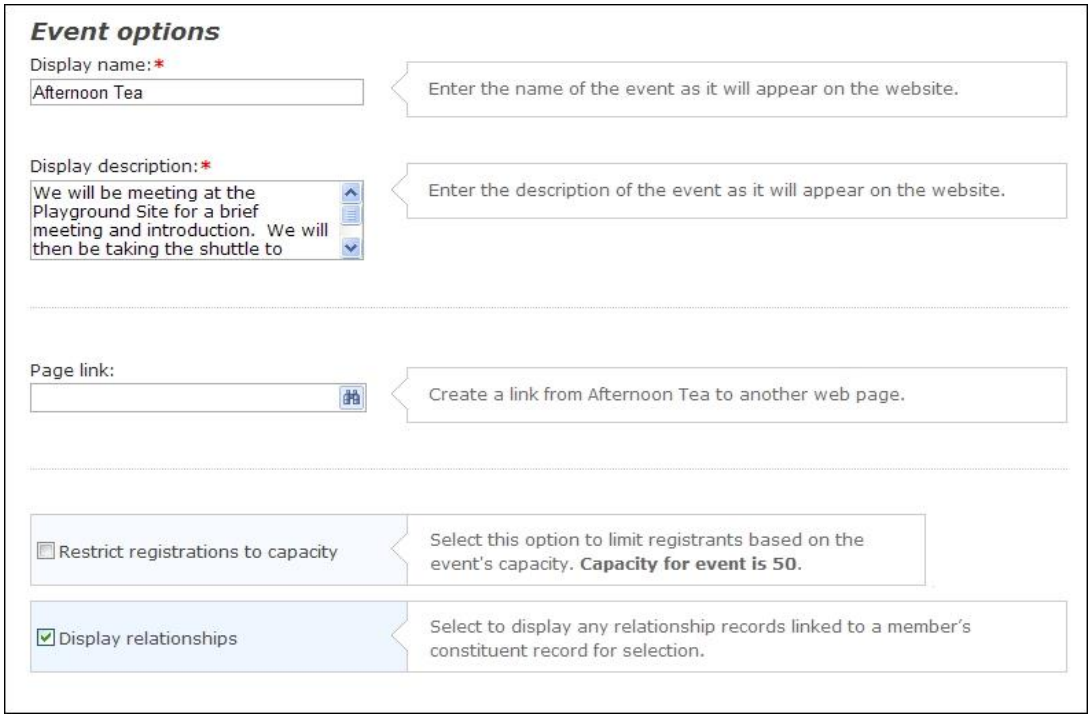


To add an event to the field list, click **Add Event**. The Event Search screen appears so you can select an event.

You can use this event registration form for more than one event. To add another event to the form, click **Add Event** and select an additional event. After you select an event, additional options appear for you to set up how its registration appears on the form.

Tip: By default, event registration fees apply to the designation associated with the event in Blackbaud CRM.

a. Under **Event options**, in the **Display Name** field, enter the name of the event as it will appear on the website.



b. In the **Display Description** field, enter the description of the event as it will appear on the website.

   By default, the text in the **Description** field appears in the **Display Description** field.

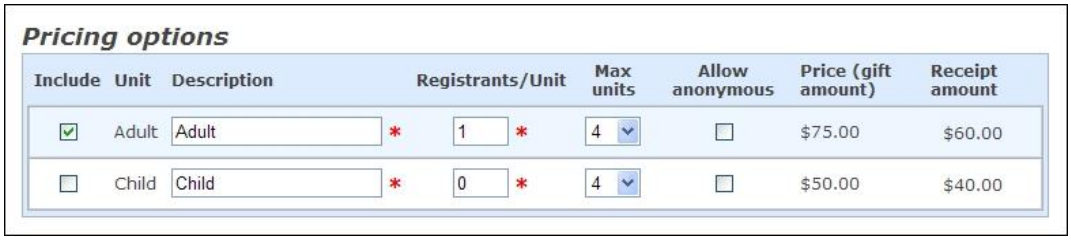
c. Under **Page Link**, to add a link to another web page, click the binoculars. The Create Page Link screen appears. For information about how to create a page link, see the *Program Basics Guide*.

d. The help text displays the capacity entered offline for the event. To limit how many registrants can sign up for the event using the event registration form online, select **Restrict registrations to capacity**.

e. To display any relationship records linked to a member's constituent record in Blackbaud CRM for selection in registrant fields, select **Display relationships**.

   For example, Mark Adamson has a constituent record. His wife Vicki has a relationship linked to Mark's constituent record. If you select **Display relationships**, when Mark registers for the Annual Golf Tournament on your website, Vicki's name appears in the drop-down list when Mark assigns participants. He can select Vicki or enter another name.

f. Under **Pricing Options**, select the prices to appear on the registration page for each event unit. To display a listed price, select its checkbox in the **Include** column.



In the **Description** column, enter the text to appear on the registration page for each event unit, such as "Individual" or "Couple."

Note: When you define the number of registrants for each pricing option, we recommend you enter the number of registrants assigned to the corresponding registration option in Blackbaud CRM.

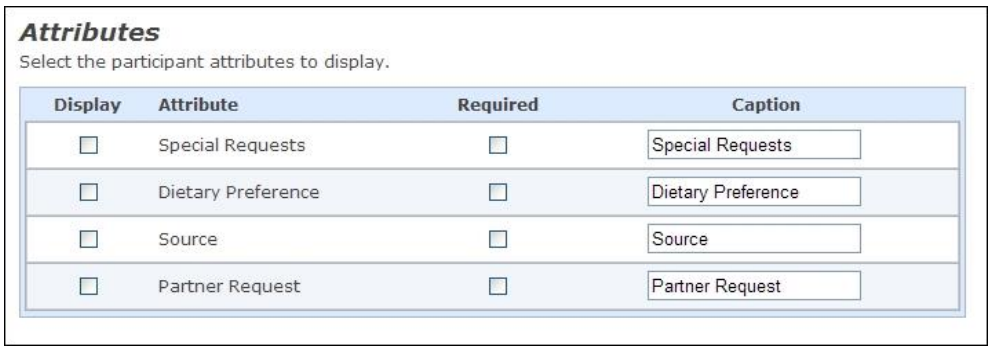
In the **Registrants/Unit** column, enter the number of people allowed for the unit.

In the **Max units** column, select the maximum number of each unit allowed for each registration. By default, this value is "4."

To allow participants to register for an event unit anonymously, select its checkbox in the **Allow anonymous** column. When you select this checkbox, the **Name** field is not required when the website user registers for the event unit.

In the **Price (gift amount)** and **Receipt amount** columns, data from the Prices tab of the event record appears and is disabled. You cannot change this information on the website. To change the price or receipt amount, edit the event record offline.

g. Under **Attributes**, select the registrant attributes to appear on the event registration page. To display a participant attribute, select its checkbox in the **Display** column.



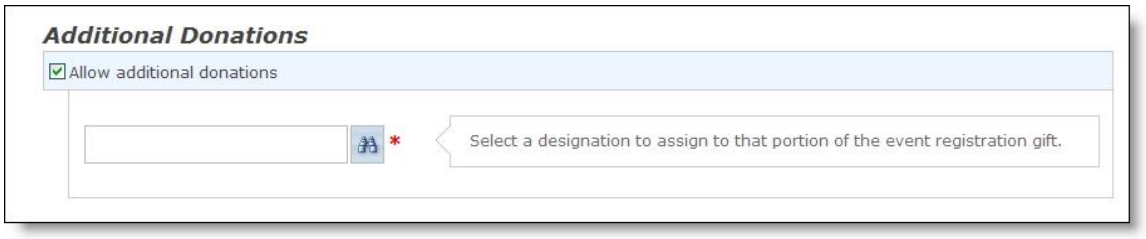
Tip: Constituent attributes are not available for the Event Registration Form. You can only select one-per-record registrant attributes with a type of Date, Text, Number, Currency, and Yes/No. Table type registrant attributes are available without being marked as one per record. Fuzzy Date and Constituent Name types are not available for the part. If you recently added a new registrant attribute in Blackbaud CRM and it does not appear in the **Attributes** grid, click **Refresh code tables** in *Code tables*. This updates code tables from Blackbaud CRM in Blackbaud Internet Solutions. For more information about how to update code tables, see the *Administration Guide*.

To make a selected registrant attribute required, select its checkbox in the **Required** column.

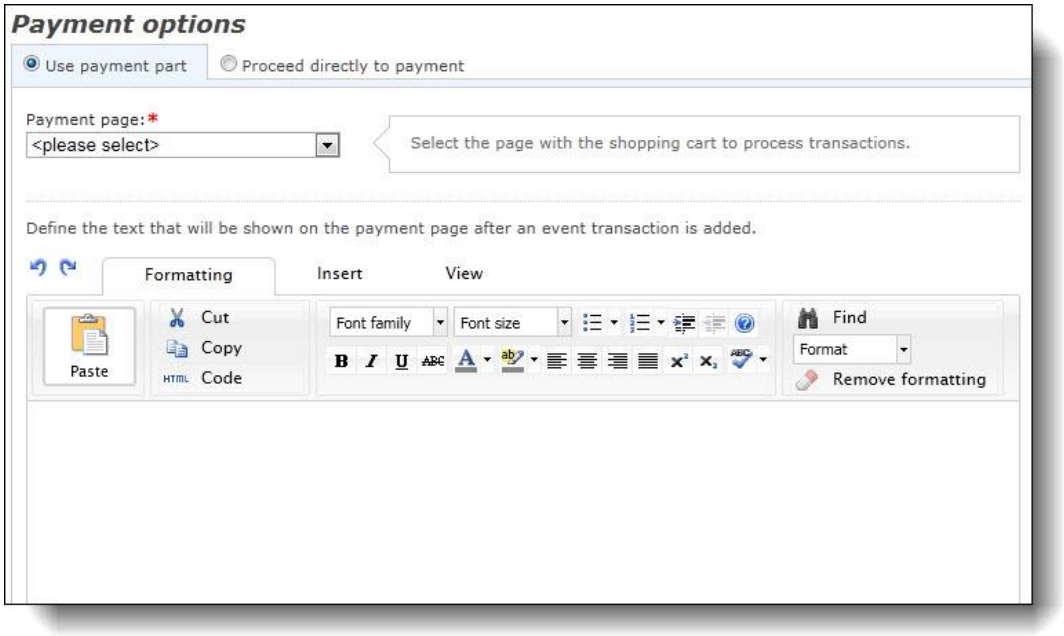
To change the text of the registrant attribute on the registration page, in the **Caption** field, enter the text to appear.

Note: When you download an event registration, the "Online registrant" status defaults on the registrant record. On the event record, this status also appears in the **Online registrant** column on the Registrants tab.

8. Under **Additional Donations**, to include an additional contribution field on the event registration page, select **Allow additional donations**. In the field that appears, select the designation to credit for additional donations. The gift is linked to the participant's constituent record, but not directly to the event record.



9. Under **Payment Options**, select the payment options for website users.
   a. To allow website users to pay for multiple transactions at one time, select **Use payment part**. The **Payment** frame appears.

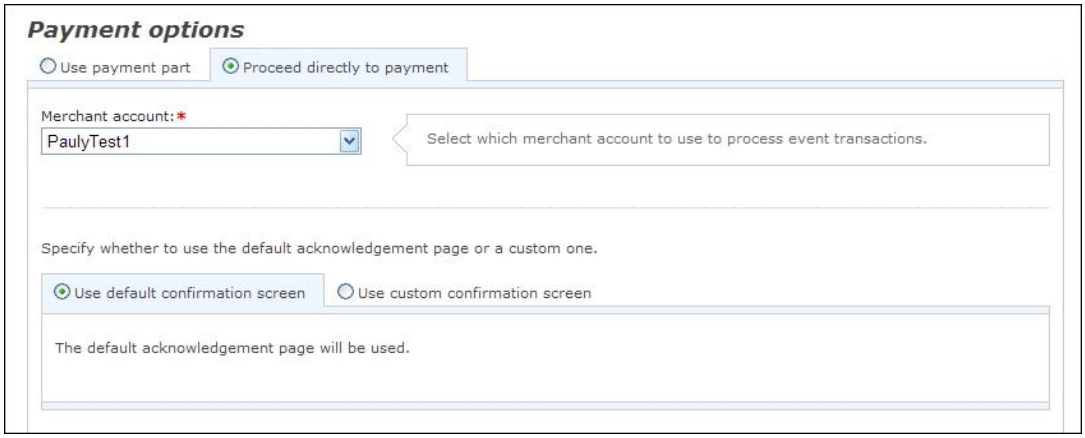


   In the **Payment page** field, select the web page to use to process event registrations. The Payment part on the selected page determines the payment methods and merchant account used to process event registrations. For information about the Payment part, see Payment on page 103.

Note: If your payment page uses a Payment 2.0 part, the payment method for it and this part must match. For example, you cannot select a payment page that only accepts direct debits because this part only accepts credit cards.

   In the box, enter the text to appear on the payment page after an event registration is added. To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

   b. To require website users to pay for event registrations one at a time, select **Proceed directly to payment**. Additional options appear.



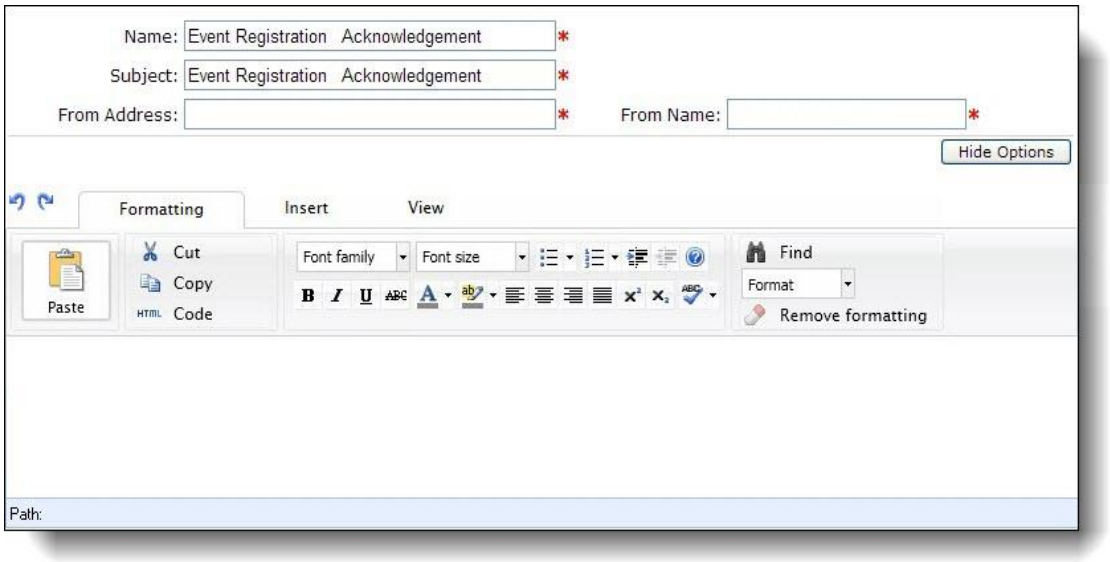
In the **Merchant Account** field, select the merchant account to use to process credit card transactions received through the event registration form, such as your organization's Blackbaud Merchant Services account.

The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

Select whether the default confirmation screen or a custom confirmation screen displays the summary after a user registers for an event. If you select **Use custom confirmation screen**, the HTML editor appears and displays the default confirmation screen. Customize the default confirmation screen according to your needs. To format the content's appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields.

Tip: If you customize the default confirmation screen, the customizations remain even if you later select **Use default confirmation screen**. To remove your customizations for the screen, select **Use custom confirmation screen** and click **Restore default content**. The program's default confirmation screen appears in the HTML editor.

10. Click **Next**. The Acknowledgement Email screen appears.



11. Create the email to acknowledge the registration. For information about how to design an email

acknowledgement for an event registration, see the *Email Guide*.

For information about event registration loop merge fields, see Event Registration Loop Merge Fields on page 66.

Tip: When you edit an Event Registration Form, you can click **Acknowledgement Email** to access the Acknowledgement Email screen.

12. Click **Save**. You return to *Parts*.

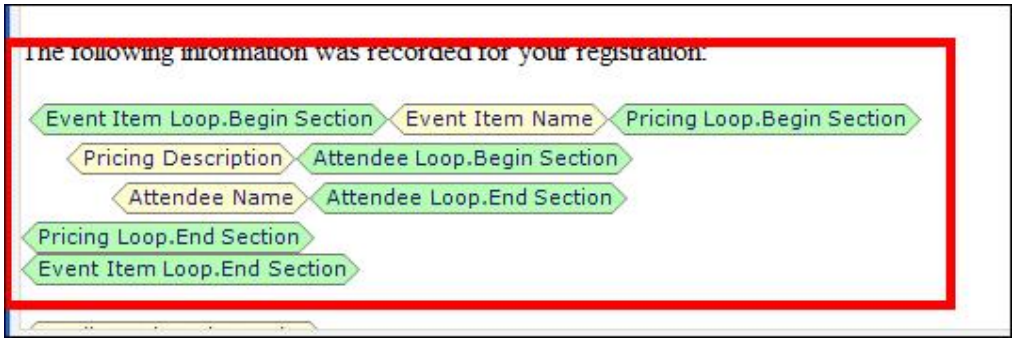
Event Registration Loop Merge Fields

Several merge fields output the same registration data, but in different ways. To merge all registration data into one table without the ability to format and change labels, select the **Registrations Block** merge field. To merge registration data in loops for multiple events, registrant types, and attendees, select the **Event Item** loop merge fields, **Pricing** loop merge fields, and **Attendee** loop merge fields. These loop fields merge data so you can change labels and use format options to customize the information.

For example, you create an email acknowledgement for a golf tournament that includes attendees in the Individual and Family registrant type. When you use the loop merge fields, the program makes the following loops to merge data.

- **Event Item** loop merge fields — The program first checks the number of events to include in the acknowledgement. In this example, there is one loop because your merge includes data for just the golf tournament event.
- **Pricing** loop merge fields — Next, the program merges data through loops for registrant types. In this example, the program makes two loops, one for the Individual type and one for the Family type.
- **Attendee** loop merge fields — Lastly, the program loops the actual list of attendees for each registrant type. This happens multiple times depending on the number of attendees. The program first loops through the Individual registrant type to merge data for the attendee list. Next, the program loops through the Family registrant type to merge data for the attendee list.

Event registration loop fields must be nested in the order they appear in the merge field list. The nesting order is **Event Item** loop fields, **Pricing** loop fields, and **Attendee** loop fields. If you list the fields out of order, for example you list the **Attendee** loop fields outside of the **Event Item** loop fields, or as standalone fields, the data does not merge correctly.



Flash Player

With the Flash Player part, you can display dynamic, multimedia content on your website with Flash technology. Flash files can support audio and video to add interactivity to web pages. You can use the Flash Player part to

add animation or integrate video into your website.

Design Flash Player

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, select a Flash file under **Select File**.

   - To search for a file on your network or computer, click **Browse**. The Choose file screen appears.
   - To use a URL to point to the file, enter the location of the file in the **Provide URL** field.

2. In the **Height** and **Width** fields, enter the size for the Flash Player part. In the corresponding fields, select a valid CSS length unit, such as "%" or "px."
3. In the **Display method** field, select how to display the Flash Player.
   - To display the Flash Player in a separate window, select "Window." In Window mode, the Flash file appears to be on the web page but is actually on a separate window above the browser window.
   - To display the Flash Player in the browser window with an opaque background, select "Opaque."
   - To display the Flash Player in the browser window with a transparent background, select "Transparent."
4. After you select a Flash file, it appears under **Preview**.
5. Click **Save**. You return to *Parts*.

Formatted Text and Images

To include text and images from *Image library* on your web pages, such as your organization's mission statement and logo, use the Formatted Text and Images part. You can also use the Formatted Text and Images part to create a footer for your website that includes your webmaster's contact information. On the Content tab of the Formatted Text and Images part, use the HTML editor to create and format the text and images to appear.

On the Options tab, you can specify whether website users can copy the content from your website, such as from a personal page, to use on another web page. For example, the site user can copy the HTML code necessary for the content on her personal page to appear on a social networking profile page, family website, or weblog.

Each new and revised Formatted Text and Images part must pass a content approval workflow to appear on your website. For information about the content approval workflow, see the *Administration Guide*. You can add approved Formatted Text and Images parts to each web page in *Pages & templates*. For more information about how to add content parts in *Pages & templates*, see the *Website Design Guide*.

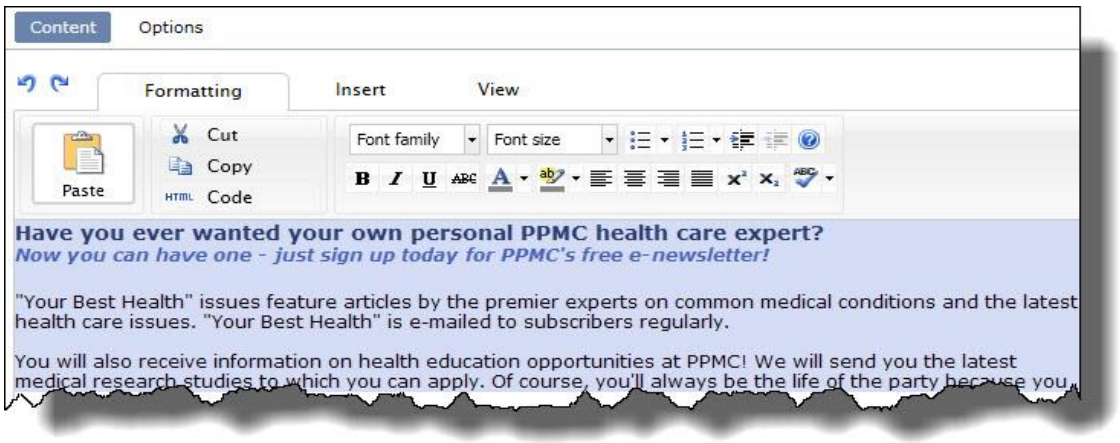
Warning: You cannot use HTML to embed your own form via HTML in a Formatted Text and Images part. We recommend you put the form on a page that is not stored online but can be referenced in an <iframe> element tag. For more information about how to include customized forms on the website, contact Blackbaud's Professional Services at solutions@blackbaud.com.

The Formatted Text and Images (Secured) part is the same as the Formatted Text and Images part with the additional ability to secure the page's content using Secure Sockets Layer (SSL). When the secured part is on a page, the page's URL starts with "https". To design a Formatted Text and Images (Secured) part type, follow the same steps as the Formatted Text and Images part.

Design Formatted Text and Images

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, select the Content tab.



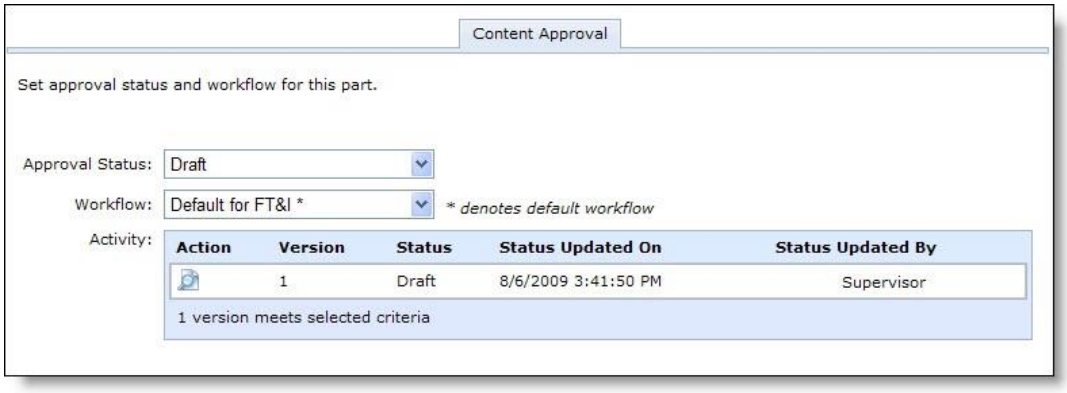
2. In the HTML editor content area, enter the content and format its appearance and layout. For example, you can manually enter or copy and paste your organization's mission statement. For more information about the HTML editor, see the *Program Basics Guide*.
3. To allow site users to copy and paste the content's HTML code:
   a. Select the Options tab.

b. Select **Enable HTML code publishing**.

c. In the **Help text** field, enter custom text to appear on the web page to help site users understand how and why to copy the HTML code. By default, the message "Copy and Paste the following code where you would normally publish HTML content" appears.

4. Select the content approval workflow to use with the part and its approval status in the workflow.

   a. On the Edit Part screen, select the Content Approval tab. For information about the items on this tab, see Content Approval Tab on page 13.



   b. If you have rights to manage workflows, the **Workflow Name** field appears. In this field, select the workflow to apply to the part.

      When you create a workflow in *Workflows*, you can select whether it is the default workflow for the selected part type. When you design a part and select its workflow in the **Workflow Name** field, an asterisk (*) appears next to the default workflow. For more information, see the *Administration Guide*.

   c. When you complete the design of the part and its content, in the **Approval Status** field, select "Ready for Approval." Until the part is complete and ready for approval, select the approval status of "Draft."

5. Click **Save**. You return to *Parts*.

Formatted Text and Images (Secured)

The Formatted Text and Images (Secured) part is the same as the Formatted Text and Images part with the additional ability to secure the page's content using Secure Sockets Layer (SSL). When the secured part is on a page, the page's URL starts with "https". To design a Formatted Text and Images (Secured) part type, follow the

same steps as the Formatted Text and Images part. For more information, see Formatted Text and Images on page 68.

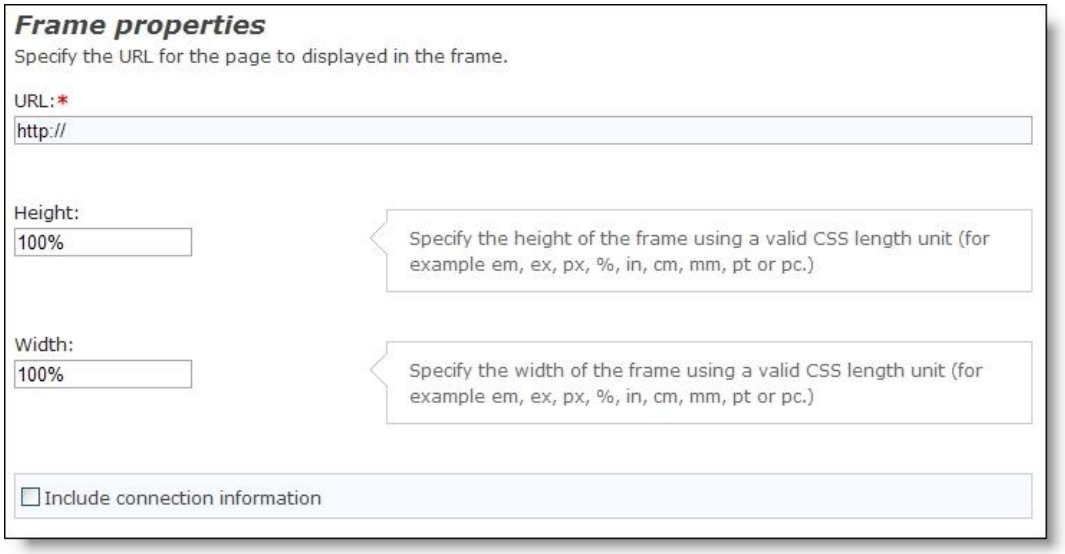
Frame

With the Frame part, you can store a live web page from another website on your site. This part is helpful when you migrate from one website to a new one. For example, you can store pages from your organization's old website in a frame for your new website.

Design Frame

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **URL** field, enter the web address of the web page to appear in the Frame part.



2. In the **Height** and **Width** fields, enter the specifications of the Frame part. Use a valid CSS length unit, such as % or px.
3. When you select **Include connection information**, the program submits form data plus the REID and DIRECTORYREID to the iFrame. REID is the logged in user's constituent ID and DIRECTORYREID is a value taken from the current page's REID value in the query string.

   Use **Include connection information** only for more complex web applications that are designed to receive this data.
4. Click **Save**. You return to *Parts*.

Giving Search

Note: The Giving Search part is deprecated, and we recommend that you use the more powerful Designation Search part instead. The Giving Search part still exists for backward compatibility of your website, but Blackbaud encourages you to use the Designation Search part. The newer part allows users to enter key words or select

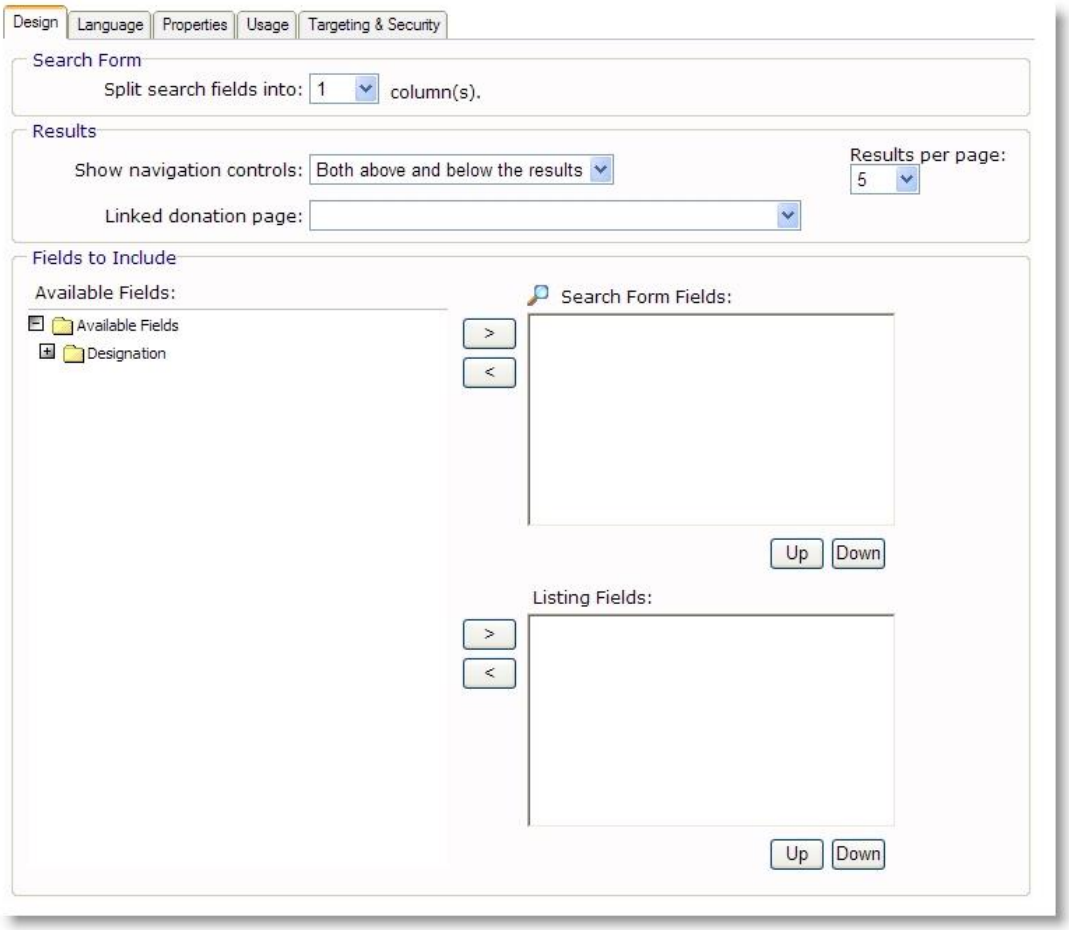
search filters to search for designations, and you can use it in combination with other parts to create a powerful designation search feature for your website. For more information, see Designation Search on page 27.

Create a Giving Search part to provide an online designation search for donors. Donors use the search to find a designation and make a donation. When the search results appear, a donor clicks the designation to navigate to the donation page. When you create the Giving Search part, you can select a query of designations so donors do not search all designations in your database.

Design Giving Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Search Form**, in the **Split search fields into** field, select how many columns of search fields to include in the criteria table. You can display up to five columns.



2. Under **Results**, set up how search results appear in the giving search.
   a. In the **Show navigation controls** field, select whether the navigation buttons appear above the results, below the results, or both.
   b. In the **Results per page** field, select the maximum number of funds per page in the search results. You can display up to 50 results per page.

      The giving search can return up to 200 funds that match the criteria entered by a site user.

c. The search results link to a donation page on your website. In the **Linked donation page** field, select the donation page.

3. Under **Fields to Include**, select the fields to use in the giving search. To move a field from the **Available Fields** box to the **Search Form Fields** box, select the field and click the right arrow.

   To move a field in the **Search Form Fields** box, select the field and click the **Up** or **Down** button. The search fields on the web page appear in the same order as the fields in the box.

Note: The fields in the **Search Form Fields** box and the **Listing Fields** box do not have to match.

4. Select the fields to appear in the search results. To move a field from the **Available Fields** box to the **Listing Fields** box, select the field and click the right arrow.

   To move a field in the **Listing Fields** box, select the field and click the **Up** or **Down** button. It is important to remember the following about the fields listed in the box.

   - The donation automatically applies to the designation selected in the search results.
   - Result fields on the web page appear in the same order as the fields in the box.
   - The first field becomes a link to the donation page.
   - The first field is disabled in the **Designation** field on the donation page. The user cannot change it.
   - If included, the donation confirmation screen includes the value from the first field when the **Designation** merge field appears on the screen.

Tip: You can use the link in the search results to include a URL to your donation page in an email. To obtain the URL for the donation page, right click on the link. From the menu that appears, select **Copy Shortcut**. Go to your email to paste the URL into your email message. When a recipient clicks the URL, the donation page appears. The field selected first in the **Listing Fields** box, which is the link in the search results, is disabled in the **Designation** field on the donation page and the website user cannot change the information in the field. To link to a donation page this way, it is best to include fields such as **Fund ID** or **Description** first in the **Listing Fields** box. These are logical fields to appear in the **Designation** field.

5. Click **Save**. You return to *Parts*.

Language Selector

With the Language Selector part, you can allow website users to select language preferences for your website. Users select their preferences from the languages available on your website. You can make languages available in the **Supported Languages** section on the Settings tab in *Sites & settings*. The website renders text for selected languages based on the Language tabs of the parts on your website.

Tip: For the Language Support part to be effective, you must localize text on the Language tab before you use the part.

After users select languages, the website localizes text on the parts on your website. For example, if a user selects Spanish as the preferred language and goes to a donation form, the Donation Form part displays localized Spanish text from the Language tab. For more information about the Language tab and international pages for your website, see Add Localized Text For Web Pages on page 11.

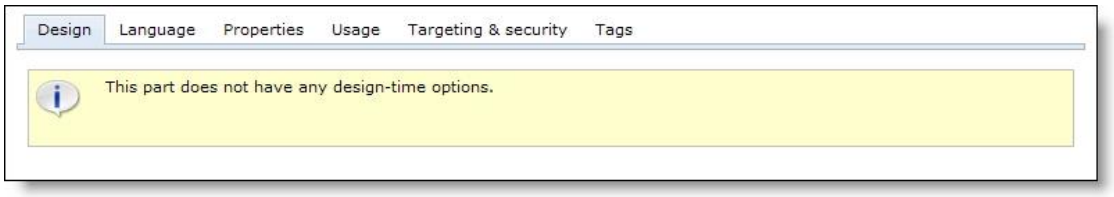
Language preferences remain in place when users return to your website. For registered users, the program associates language preference with user logins. For anonymous users, the program associates language preferences with cookies on their machines.

Note: If you enable *Multicurrency* in Blackbaud CRM to accept multiple currencies, the Language Selector part also translates currencies on donation forms. Users enter or select donation amounts in your default currency, and the form displays approximate values in the currency associated with the preferred language. To calculate values in preferred currencies, the program uses exchange rates from Blackbaud CRM. However, exchange rates may change before you process transactions, so the values on the forms are only estimates. For information about how to configure *Multicurrency*, see the Blackbaud CRM *Multicurrency Guide*.

Design Language Selector

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. On the Design tab, the Language Selector part does not contain design options.



2. Select the Language tab. You can edit default text and localize text for other languages. The tab appears on parts such as the Donation Form and Giving Search. For more information about the Language tab, see Language Tab on page 10.

3. The **Category** field lists the areas on the part that you can edit. For the Language Selector part, you can only edit the Form fields category.
4. In the **Language** field, select the language to localize. You can make languages available in the **Supported Languages** box on the Settings tab in *Sites & settings*.
5. In the **Text** column, enter text to rename the language field or localize it for other languages.

Note: The default language selection is based on the primary language for the website user's Internet browser. If you do not support the browser language in the **Supported Languages** section on the Settings tab in *Sites & settings*, the default selection is based on your default language.

6. Click **Save**. You return to *Parts*.

LinkedIn Group Join

With the LinkedIn Group Join part, you can invite website users to join your *LinkedIn* groups. After users join a group, the part displays an option to view the group on *LinkedIn*.

Show Me: Watch a video about the LinkedIn Group Join part.

When you create the part, you use the HTML editor to format and design content for the part on the web page. As you do this, you include merge fields to display group information and display the join and view options.

Warning: The LinkedIn Group Join part requires API information from *LinkedIn* to access its data. In *Sites & settings*, you enter the keys, token, and secret for your *LinkedIn* application to process information on this part. For more information about *LinkedIn* applications, visit the LinkedIn Developer Network. For more information about *Sites & settings*, see the *Administration Guide*.

LinkedIn Steps on Your Website

You can include the LinkedIn Group Join part on any web page such as your home or registration page. However, we recommend you include the part on the page users navigate to after registering or logging in to your website. This way, when a user joins your LinkedIn group, the user's profile information processes to the constituent record in Blackbaud CRM. When you place the part on a page, one of three scenarios happens on the part.

- A website user does not have a constituent record in Blackbaud CRM and registers as a member of your website. The user then clicks the option to join your *LinkedIn* group. After the user joins the group on your page, the view option appears. When the user clicks this, the group appears in a new window or tab on *LinkedIn*.

  When the user registers as a member of your site, a transaction processes to Blackbaud CRM to create a constituent record for the user. The user's *LinkedIn* profile and group information processes to the back end and the information automatically appears on the constituent record once it exists. This process may take up to 24 hours. Once it completes, you can view the data on the Contact tab under **Social media accounts**.

- A website user has a constituent record in Blackbaud CRM and is also a member of your website. While logged into your website, the user clicks the option to join your *LinkedIn* group. After the user joins the group on your page, the view option appears. When the user clicks this, the group appears in a new window or tab on *LinkedIn*.

  This automatically processes the user's *LinkedIn* profile and group information to the constituent record in Blackbaud CRM. On the Contact tab, you can view the data under **Social media accounts**.

- A website user has a constituent record in Blackbaud CRM and is also a member of your website. However, the user is not logged into your site and clicks the option to join your *LinkedIn* group. After the user joins the group on your page, the view option appears. When the user clicks this, the group appears in a new window or tab on *LinkedIn*.

  This workflow does not process any data for the user to Blackbaud CRM.

Join — When a user is not in a group, the join option appears on the page based on your HTML editor design. The following graphic is an example of the part on the side of the page. It includes a header, group text, and a join button.

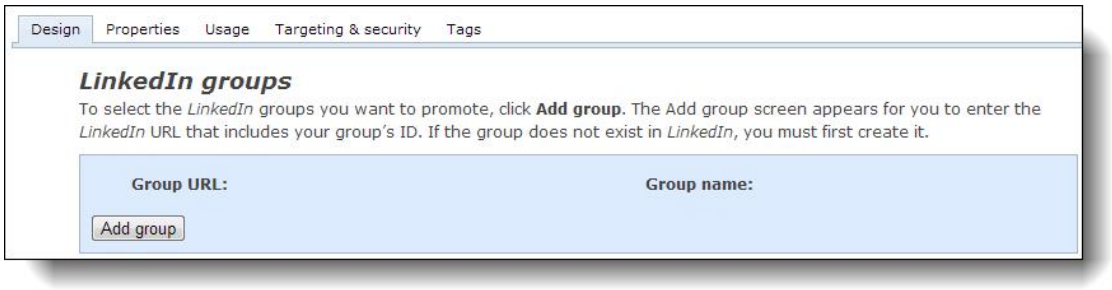
View — When a user is in a group, the view option appears on the page. It uses the same HTML editor design as the join option. The following graphic is an example of the part on the side of the page. It includes a header, group text, and a view button.

Note: The **Join group** and **View group** merge fields generate the join and view options on your page. If the user is not in a group, the join option automatically appears. If the user is in a group, the view option automatically appears.

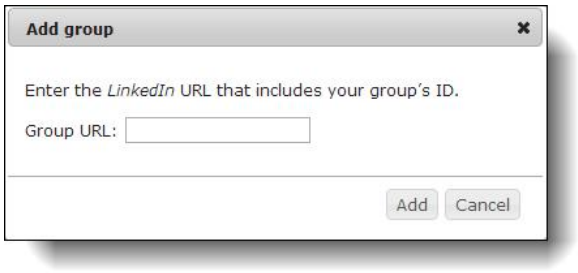
Design LinkedIn Group Join

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, to include your organization's groups from *LinkedIn* on the web page, click **Add group** under **LinkedIn groups**.



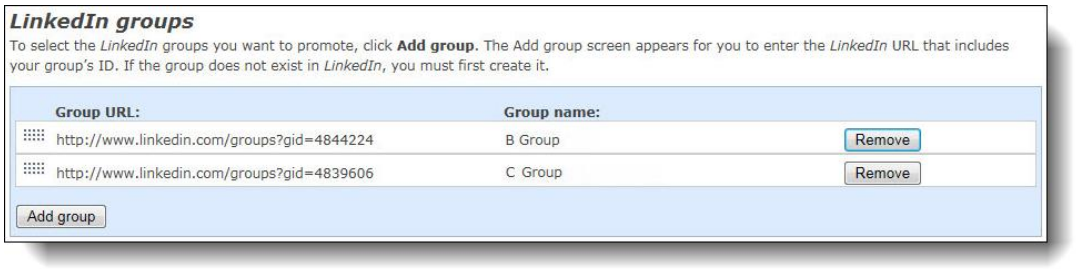
The Add group screen appears.



a. In the **Group URL** field, enter the *LinkedIn* URL that includes your group's ID.

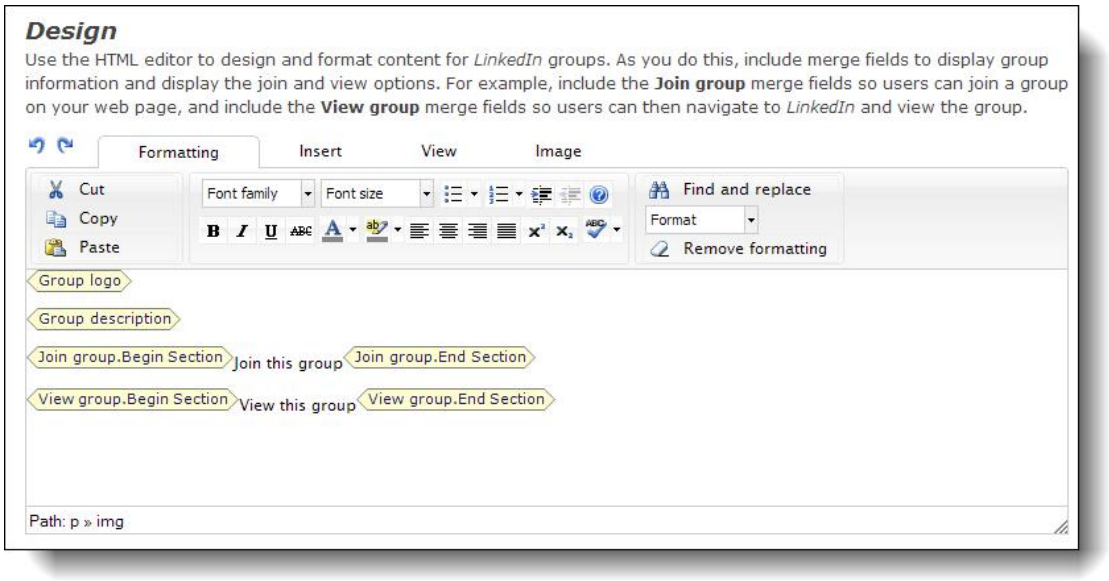
b. To return to the Design tab, click **Add**.

   The group name from *LinkedIn* appears in the grid along with the URL.



c. Repeat these steps to include additional groups on the page.

2. Under **Design**, use the HTML editor to design and format content for *LinkedIn* groups on the page. For more information about the HTML editor, see the *Program Basics Guide*.



As you do this, include merge fields to display group information and display the join and view options. For example, include the **Join group** merge fields so users can join a group on your web page, and include the **View group** merge fields so users can then navigate to *LinkedIn* and view the group.

There are several important items to remember as you design this content.

- The HTML editor default content includes the merge fields you need to display groups on the page. When you customize the content for your page, you can style the part to display a header and you can style the **Join group** and **View group** merge fields to appear as links or buttons.
- When you include more than one group under **LinkedIn groups**, the program automatically repeats your content design for each group you include. For example, you design and format the group section once. If you include three groups in the grid, your content appears three times on the web page.
- To provide a join option on the web page, you must use the begin and end **Join group** merge fields, and to provide a view option, you must use the begin and end **View group** merge fields. If the user is not in the group, the join option appears. If the user is in the group, the view option appears.
- Make sure all of the text you include applies to the join option and the view option. The program renders the **Join group** and the **View group** merge fields based on whether the website user has joined a group, but the rest of your content in the HTML editor is the same on the page.

3. Click **Save**. You return to *Parts*.

Membership Form

Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

The Membership Form part includes a membership section on your website to solicit new members for your organization or for existing members to renew their memberships.

When you design the part, you can include multiple membership programs. You select to include information such as the membership levels and terms.

Note: Annual dues-based programs purchased on your website must be paid in full . Lifetime dues-based programs purchased on your website can be paid in full or can use installment plans. Other types of programs are not available to use on your website.

For the website administrator who sets up the part:

- Step 1, Pick your membership programs: A list of available membership programs is displayed. You select the ones you want to be available for a user to pick on your website. You can also change the text for the names and descriptions to alter how they will appear on the website. Then you set up payment part information.
- Step 2, Configure programs: For each program, you select the levels that will be included, as well as the terms, if applicable. You also select the payment options members will have to choose from, such as pay in full, if applicable.
- Step 3, Save the part: After you configure your programs, you save the part and can add it to a page. For more information about how to set up the part, see Design Membership Form on page 78.

Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch in ***CRM*** that does not have the **Bill to** field marked as required.

For the prospective member who visits your website:

- Step 1, Pick your membership: Buttons for each available membership program, level, and term combination are displayed. The visitor clicks the button for the one he wants to join. The total cost is displayed.
- Step 2, Add to cart: The visitor clicks **Add to cart** and is redirected to the payment page to enter name and address information.
- Step 3, Pay for the membership: The visitor clicks **Check out** to complete the transaction.

When an existing member logs into the website, the membership closest to the expiration date is highlighted and the expiration date is displayed. Members can select the program and renew the membership.

Design Membership Form

Tip: In *Pages & templates*, we recommend you do not add more than one Membership Form part on a page.

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Build your part**, select **Pick your p**rogram**s**.
2. Select which membership programs to include in the part. The order of the programs in the list is the order they will appear in on your website. You can click and drag the programs in the membership part to change their order.

   For each program you select to include, a new configuration option appears under **Build your part**.
3. Under **Payment setup**, select the Payment page to use. The Payment part on the selected page determines the merchant account used to process memberships. Memberships can only be purchased online using a credit card. For information about the Payment part, see Payment 2.0 on page 107.

   You also can design an acknowledgement message. On the Payment 2.0 part, you can use the **Combined Acknowledgements** merge field to include this message on the confirmation screen and acknowledgement email that users receive after they check out.

4. Under **Build your part**, select each program to configure it. When you configure each program, you can select which levels and terms, if applicable, of the membership program will be available on your website. You can modify the display names and descriptions, if needed.
5. You can also select which payment options will be available for the membership program on your website. At least one payment option must be selected. If there is only one payment option defined, it is selected by default and cannot be changed.

   Note: Annual dues-based programs purchased on your website must be paid in full. Lifetime dues-based programs purchased on your website can be paid in full or can use installment plans. Other types of programs are not available to use on your website.
6. Click **Save**. You return to *Parts*.

Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch in ***CRM*** that does not have the **Bill to** field marked as required.

Menu (Deprecated)

Warning: The Menu (Deprecated) part was replaced with the more powerful Menu part. The Menu (Deprecated) part type appears in *Parts* only if you have saved Menu (Deprecated) parts. While the deprecated part continues to operate for backwards compatibility on your website, you can no longer create or copy Menu (Deprecated) parts. The Menu part includes all the functionality of the Menu (Deprecated) part. In addition, the Menu part supports standards for Website Accessibility (WAI) and includes a number of standard style options without the use of CSS. It also includes an import tool to help upgrade your Menu (Deprecated) parts. For more information, see Menu on page 79.

Menu

With the Menu part, you can create a menu and a popup menu for your website. For example, when you visit Blackbaud's website and hover over the **Products** menu, a popup menu appears. The popup menu includes menu items such as **Internet Solutions** and **Fundraising**. You can create a similar menu for your website using Menu.

Note: Some mobile devices do not support popup menus. If you use popup menus on your website, we recommend that you also create an alternate menu for mobile devices. In *Layouts*, you can insert a content placeholder pane for the menu with popups on a layout for desktop browsers. And on a layout for mobile devices, you can insert a content placeholder pane for the menu without popups. You can then select the layouts for a template and place only the appropriate Menu part in each pane. This way, only the correct menu will appear in desktop browsers and mobile devices. For information about how to create layouts and select them for templatess, see the *Website Design Guide*.

You create the Menu part in two steps. One step is to add the menu definitions, such as **Home** and **About Us**. For each main menu item, you can define popup menu items. The second step is to create the style and format for the menus using tables or an unordered list. For table-based menus, you can select a color and font size to appear for a menu item when a website user hovers over the menu item. You select standard CSS style options easily on the Edit Part screen in fields such as **Border color** and **Font color**. You can also create custom styles if necessary. For menus based on unordered lists, you assign the custom class for the menu.

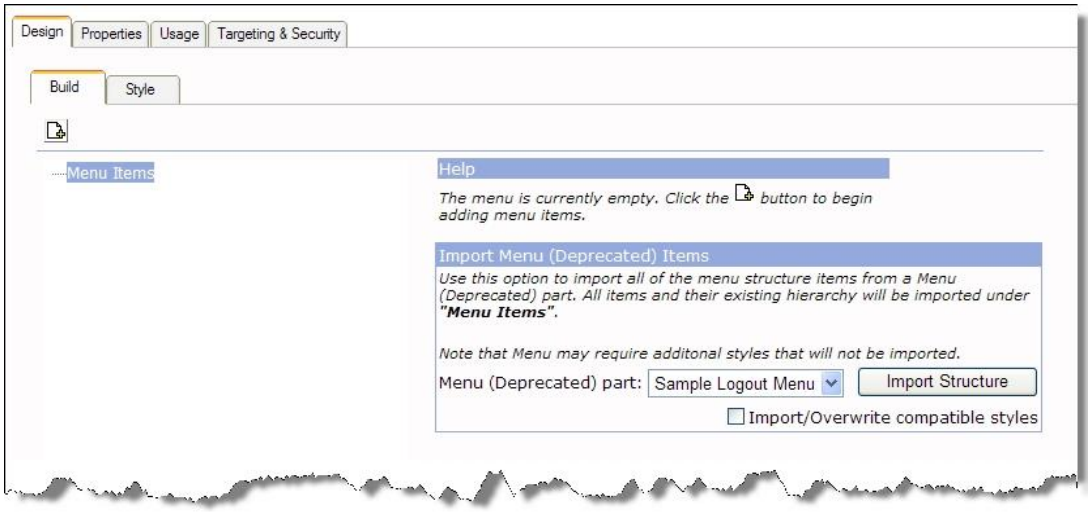
Note: You can add log in and log out links to your menu. On the menu part for the log in link, use the **Create link to special page** option to select a page that includes a User Login part. For the log out link, use the **Create**

link to Blackbaud Internet Solutions page option to select the log out page that includes the User Login part. Users view these links in the menu based on whether they are logged in or out.

Upgrade a Menu (Deprecated) part

To upgrade a Menu (Deprecated) part for Website Accessibility and more style options, import the part in a Menu part. When you upgrade a Menu (Deprecated) part, be aware that some style options may not convert to Menu. Also, additional styles may be required for Menu. We recommend you fully test a converted menu and re-create style options if necessary.

1. From the Design tab, select the Build tab. The **Import Menu (Deprecated) Items** frame appears.



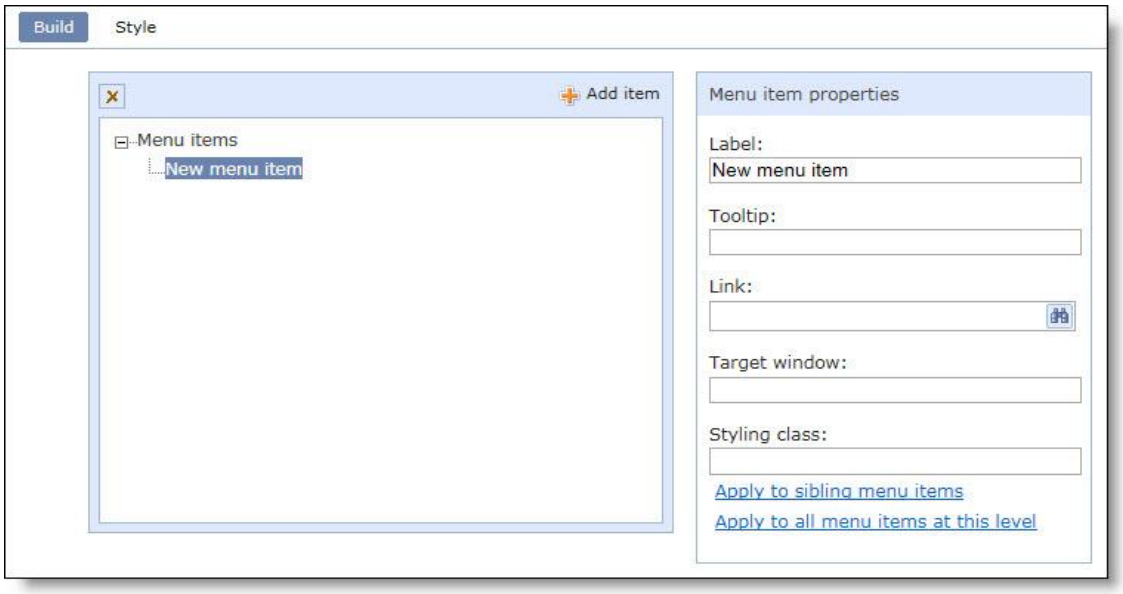
2. In the **Menu (Deprecated) part** field, a list of the existing Menu (Deprecated) parts appear. Select the Menu (Deprecated) part to upgrade to Menu.
3. To import CSS styles from the Menu (Deprecated) part, select **Import/Overwrite compatible styles**. If you do not select this checkbox, only the menu items and structure upgrade to Menu.
4. Click **Import**. The Menu (Deprecated) part upgrades to Menu.
5. Select the Style tab. The **Styling Options** frame appears. For more information about these options, see Design a Menu definition on page 80.
6. Click **Save**. You return to *Parts*.

Design a Menu definition

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

Show Me: Watch a video about how to add a web page to a menu.

1. From the Design tab, select the Build tab.
2. To add a menu item, click **Add item**. The menu item appears under the top-level parent menu item, and the **Menu item properties** frame appears.



Tip: To rearrange menu items, select them and click the arrows.

a. In the **Label** field, enter a menu item name to display in the menu.

b. In the **Tooltip** field, enter a description to display when the cursor hovers over the menu item.

c. In the **Link** field, click the binoculars to link the menu item to a web page. The Create Page Link screen appears. For information about how to create a page link, see the *Program Basics Guide*.

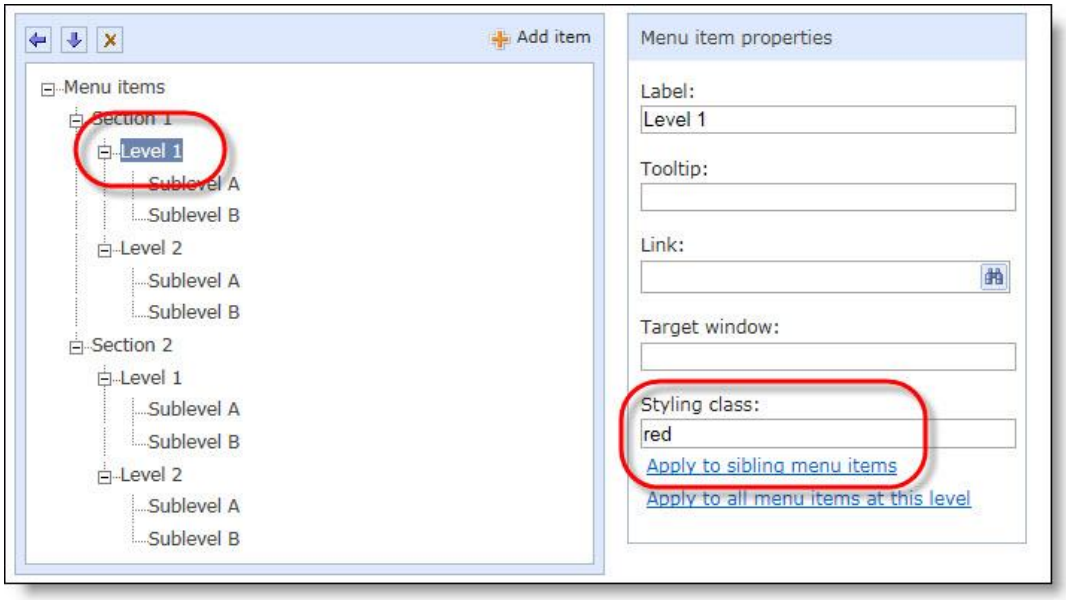
d. If you enter a window in the **Open in another window named** field on the Create Page Link screen, the **Target window** field displays the name of the window. To change the window, click the binoculars in the **Link** field.

e. If you select **Use unordered list menu** on the Style tab, the **Styling class** field and two links appear. In the **Styling class** field, enter the class name from your style sheet for the menu item. For example, you can enter "red" or "blue" to change the item's color.

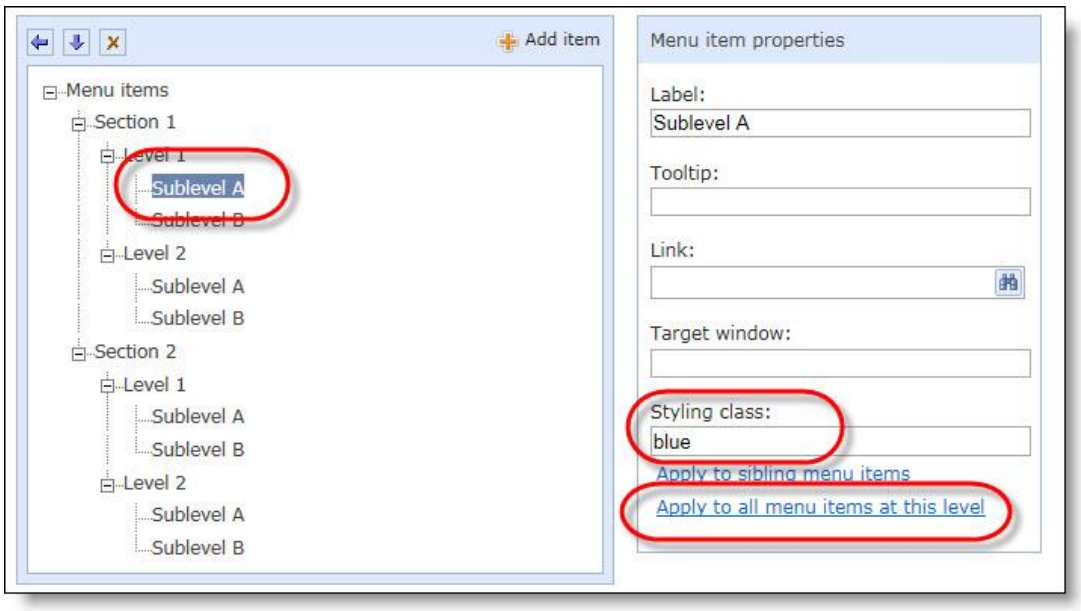
   For more information about style sheets, see the *Website Design Guide*.

- To apply the class to sibling menu items *within the same menu node*, click **Apply to sibling menu items**.
- To apply the class *to all menu items in the part on the same level*, click **Apply to all menu items at this level**.

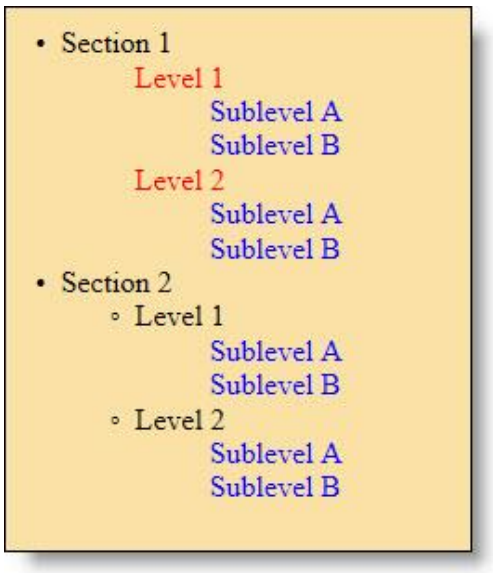
  For example, enter "red" for Level 1 and click **Apply to sibling menu items**.



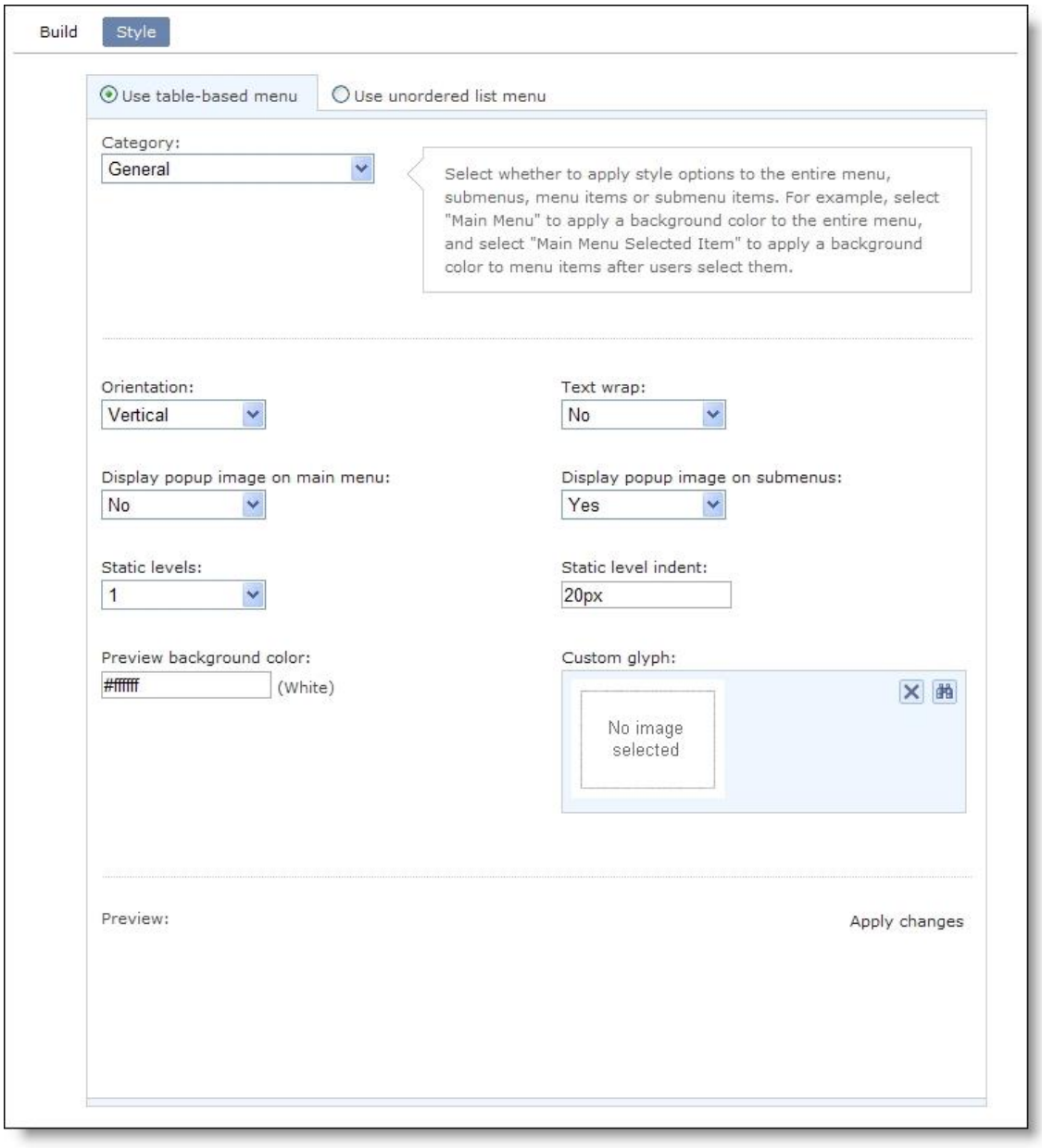
Then enter "blue" for Sublevel A and click **Apply to all menu items at this level**.



On your web page, the Level items are red in Section 1 only. Level items in Section 2 are not because you only applied the style to siblings within the same node. All Sublevel items are blue because you applied the style to all items on the same level regardless of the parent node.



3. To add an additional menu item, click **Add item**, and repeat the steps in this procedure. You can add as many menu items as necessary.
4. On the Style tab, select whether to style the menu with tables or with an unordered list formatted by CSS.
5. To style the menu with tables, select **Use table-based menu**.



a. In the **Category** field, select a style category to apply style options. For information about the style categories, see Style Categories for the Menu on page 86.

b. To create a custom class for CSS style options, select **Enable custom CSS**.

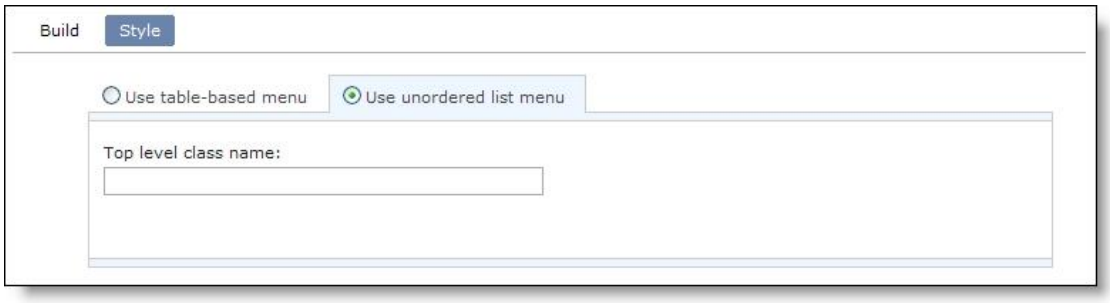
   In the **Custom class** field, enter a custom class such as ".navMenuItem." You enter the CSS for the custom class in *Style sheets*. For information, see the *Website Design Guide*.

c. To select standard CSS style options, select **Enable standard CSS**.

   The available style options depend on the style category. For information about the standard CSS styles, see Standard CSS Style Options for Menu on page 85.

d. After you select style options for a style category, select another style category. The program saves your changes.

6. To style the menu with an unordered list formatted by CSS, select **Use unordered list menu**.



7. In the **Top level class name** field, enter the custom class name. You enter the CSS for the custom class in *Style sheets*.

   For information, see the *Website Design Guide*.

8. Click **Save**. You return to *Parts*.

Standard CSS Style Options for Menu

Standard CSS style options vary depending on the category you select. Refer to the following tables for standard CSS styles for each Menu category. For information about applying standard CSS style options, see Design a Menu definition on page 80.

Style category: General

Orientation	**Display popup image on submenus**
Static levels	**Custom glyph**
Static level indent	**Preview background color**
Display popup image on main menu	**Text wrap**

Style category: Main Menu or Popup Menu

Background color	**Font size**
Border color	**Font underline**
Border style	**Font color**
Border width	**Height**
Bold	**Horizontal padding**
Italic	**Vertical padding**
Font name(s)	**Width**

Style category: Main Menu Item or Popup Menu Item and Main Menu Selected Item or Popup Menu Selected Item

Background color	**Font size**
Border color	**Font underline**
Border style	**Font color**
Border width	**Height**
Bold	**Item spacing**
Italic	**Width**
Font (names)	

Style category: Main Menu Item Hover or Popup Menu Item Hover

Background color	**Font name(s)**
Border color	**Font size**
Border style	**Font underline**
Border width	**Font color**
Bold	**Height**
Italic	**Width**

Style Categories for the Menu

In the **Category** field of the Menu part, you select style categories to apply style options. Style categories include the various menu types. This table describes the available style categories.

Style Category	Description
General	This applies to your entire menu. For example, Blackbaud's menu is horizontal at the top of every web page.
Main Menu	This is your main menu. For example, **Home**, **Products**, and **Services** are a part of the main menu on Blackbaud's website.
Main Menu Item	This is your main menu in its natural state. For example, you browse Blackbaud's website, but you are not currently hovering or clicking a menu item.
Main Menu Item Hover	This applies to a main menu item when a user hovers the cursor over it. For example, when you hover the mouse over Blackbaud's **Products** menu item, the menu button changes to a darker shade of grey.
Main Menu Selected Item	This affects a main menu item after a user clicks it. For example, when you click Blackbaud's **Products** menu, you land on the Products page and the **Products** menu button has a bright yellow background to indicate it is for the current web page.

Style Category	Description
Popup Menu	This applies to your popup menu. For example, when you hover over Blackbaud's, **Products** menu, a popup menu appears with menu items such as **Fundraising**, **Forms**, and **Solutions by Industry**.
Popup Menu Item	This is your popup menu in its natural state. For example, you hover over Blackbaud's **Products** menu to view the items on the popup menu for it, but you are not currently clicking or hovering over a popup menu item.
Popup Menu Item Hover	This applies to a popup menu item when a user hovers over the popup menu item. For example, you hover your mouse over Blackbaud's **Fundraising** popup menu item. When you do this, the popup menu button changes to a lighter shade of blue.
Popup Menu Selected Item	This affects a popup menu item when a user navigates to the web page for that menu item. For example, you click Blackbaud's **Fundraising popup** menu item. You land on the Fundraising page. You can select to style the **Fundraising popup** menu button with a bright yellow background to indicate to a user he or she is on the web page for that popup menu item.

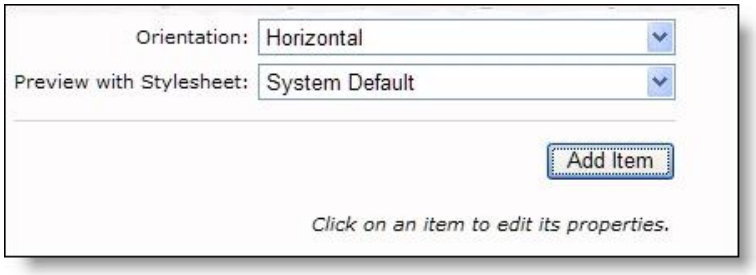
Navigation Buttons

To create a navigation bar, use the Navigation Buttons part. Buttons on a navigation bar honor security. For example, if you have a Board Members Only page, only a website user logged in as a board member can view a button on the navigation bar used to access this page.

Design Navigation Buttons

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Orientation** field, select the orientation to display the navigation bar on your web page.



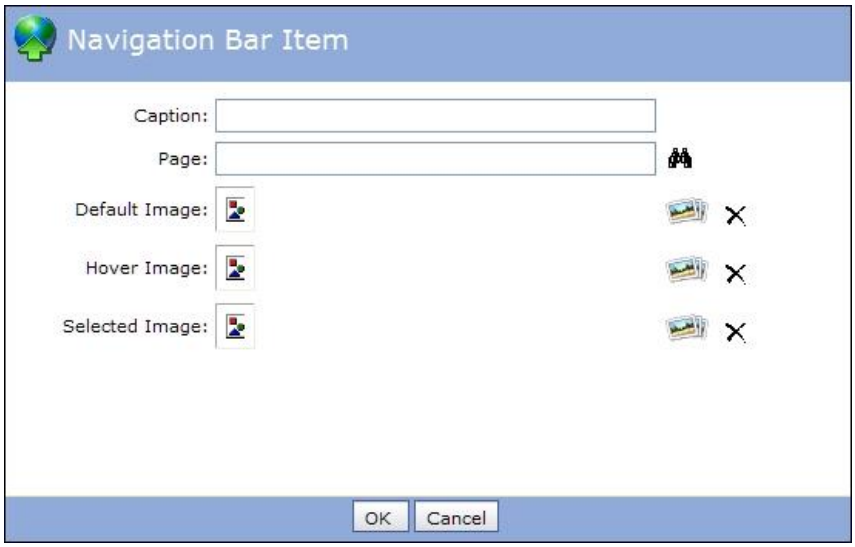
   - To display the navigation bar from left to right, select "Horizontal."
   - To display the navigation bar from top to bottom, select "Vertical."

Tip: Use the up and down arrows to sort your navigation buttons in the order they will appear on your web page.

2. In the **Preview with Style Sheet** field, select the style sheet to use for your navigation bar. For example, to use the default style sheet, select "System Default."

   For more information about style sheets, see the *Website Design Guide*.

3. To add a button for your navigation bar, click **Add Item**. The Navigation Bar Item screen appears.



4. In the **Caption** field, enter the information to appear in a yellow box when your website user moves the mouse over a navigation bar button.

Warning: All images used for navigation bar buttons must be previously created and saved using graphics software such as Microsoft *Photo Editor*. You cannot create these images in the program.

To not use images for a navigation bar button, add a linked heading for navigation. In the **Caption** field, enter the heading to link. The heading you enter appears on your web page and is linked automatically. To select the web page to link to, complete the next step in this procedure.

5. In the **Page** field, click the binoculars to select the web page where the navigation bar appears. The Create Page Link screen appears. For information about how to create a page link, see the *Program Basics Guide*.
6. In the **Default Image** field, view the image that automatically appears when your website user accesses the web page, before the website user moves the mouse over or clicks the button.

   To select a default image, click the **Image** button. The Select Image from Image Library screen appears.
7. In the **Hover Image** field, view the image that appears when your website user moves the mouse over the button on the navigation bar but does not click the button.

   To select a hover image, click the **Image** button. The Select Image from Image Library screen appears.
8. In the **Selected Image** field, view the image that appears when your website user clicks the button on the navigation bar.

   To select a selected image, click the **Image** button. The Select Image from Image Library screen appears. For more information about how to insert an image, see *Program Basics Guide*.
9. To save the images for your navigation bar, click **OK**. You return to the Edit Part screen. On the Design tab, the selected images appear.

Note: To cancel the addition of the images for the navigation bar, click **Cancel**. You return to the Edit Part screen.

10. Click **Save**. You return to *Parts*.

News Reader

The News Reader part type allows the system administrator to display Really Simple Syndication (RSS) content or Atom content on your website. These are XML-based formats used to distribute web information. For example, if your organization is health related, you can create a web page for health tips and include a News Reader part type that includes news headline feeds from other health-related websites. Using RSS or Atom and the News Reader part, you can include these headlines on your website automatically.

The website supports RSS versions 0.9, 1.0, and 2.0 and Atom version .3.

Design News Reader

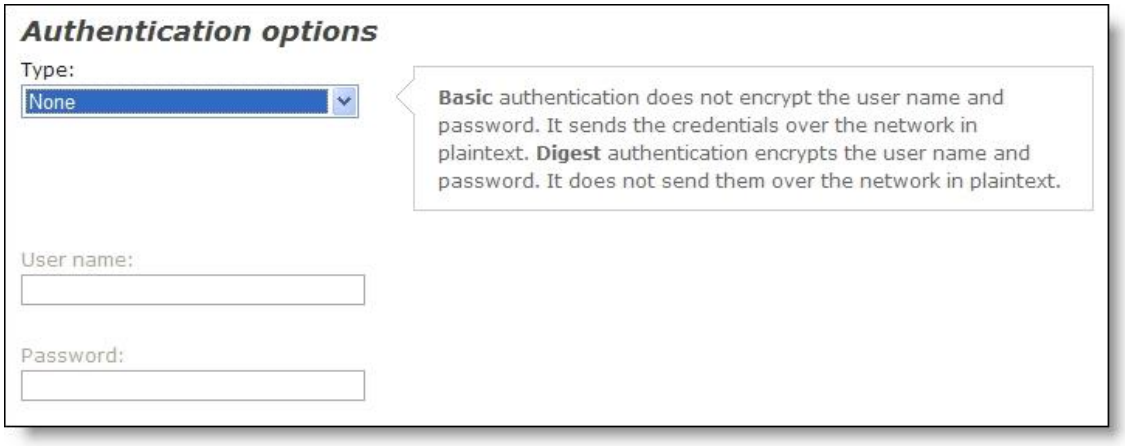
For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Source** field, enter the website address that contains the XML content to display on your website. Typically, sites that share content display orange XML icons that are hyperlinks to their website feeds.

2. In the **Link target** field, enter where to open the linked page. For example, to open the link in a new window, enter “_blank.”

3. In the **Number of articles to display** field, enter how many articles to display. To display all recent articles, leave the default “0” in the field.
4. To display articles on multiple pages, select **Display [ ] articles per page** and enter the number of articles per page.

5. To display article titles only, select **Display headlines but not articles**. Users can click links to access articles.
6. To display any graphics associated with the website feed, select **Display graphics associated with the feed**.
7. To display dates for the articles, select **Display dates for postings if available**.



8. Under **Authentication options**, enter the authentication information for a website that requires authentication to access its XML content.
    a. In the **Type** field, select the authentication type that the news feed provider requires.

Note: Basic authentication does not encrypt the user name and password and sends the credentials over the network in plaintext. Digest authentication encrypts the user name and password and does not send them over the network in plaintext.

    b. In the **User name** and **Password** fields, enter your authentication information. To display XML content that requires authentication, you must have a user name and password with the news feed provider.
9. Click **Save**. You return to *Parts*.

Page Element Types

To add sections to a web page that are dynamic and customizable for an individual's use, create page element parts. The program contains multiple page element part types for the end users of personal pages. These part types are Chapter Page Elements for chapter managers and Personal Page Elements for anyone who wants to create a personal page on your site. One example is someone who is ill and wants to create a care page for family and friends to visit. With web pages that contain page elements, the pages have customization parts (the page element types) for use on a personal level. For more information about these parts, see the *Chapter Management Guide* and *Personal Page Management Guide*.

When someone has a personal page on your site, other people who support or know the individual can visit the personal page to learn more about his relationship with your organization and make donations. Web pages with page elements also contain static sections that are other parts. Use these sections to create defaults for your organization to appear on every personal page. For example, use the static parts to include your mission statement, graphics, or any other information to appear on every personal page.

When you create a page element part, you select the type of page element to appear on a personal page. The chart lists every page element type and the page element parts where they are available. For example, for a Chapter Page or Personal Page Element, you can select a News Reader element type. Page element types create various forms of customizable parts for pages. For information about each page element type, review the procedure that applies to the type.

Page Element Type	Chapter Page Element	Personal Page Element
Action	X	X
Comments		X
Directory	X	
Event Calendar	X	
News	X	X
News Reader	X	X
Page Links		X
Photos	X	X
Profile		X
Rich Text	X	X
Text	X	X

Action Page Elements

To include a **Report Abuse** button on a web page for a Chapter Manager or Personal Page Manager part, you can create an Action page element type. Site visitors can click this button to report activity that is inappropriate for your site. When a visitor clicks this button, your website administrator automatically receives an email notification about the inappropriate activity.

Design Action for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select “Action” in the **Display As** field.

Note: You can include the Action page element in a Chapter or Personal Page element parts.

2. In the **Display Name** field, enter a name for the action section on the page.
3. In the **CSS** box, enter Cascading Style Sheets (CSS) text to override the default style of this element.

   Use CSS text to create unique elements, such as to change the text on the **Report Abuse** button. CSS is easier to use than other methods, such as HTML. Unless you specify a custom style sheet, your website uses default style sheets.

   For more information about CSS, see the *Website Design Guide*.
4. Under **Details**, depending on the personal page type you create, such as Chapter Page Element, different options appear in the **Display As** field. For more information about this field, review the chart and steps.

Chapter Page Element	Personal Page Element
Chapter Console Link	Report Abuse
Report Abuse	

5. In the **Display As** field, if you create the Action page element for a Chapter Manager part, select "Chapter Console Link." This creates a navigation link for content and data managers to click to access his Home page on your chapter site. The link appears only for managers contained in a role with rights to manage the chapter content or data. When you select "Chapter Console Link," a **Link Text** field appears. Enter the text to appear as a hyperlink on your chapter site, such as "My Console Manager." Managers of the site click the link to access the Home page.

   If you create the Action page element for a Personal Page Manager part, select "Report Abuse" to include a **Report Abuse** button on the personal web page. Additional fields appear.

   a. In the **Display Text** field, enter the text to appear on the button on your website, such as "Report Website Offense."

   b. In the **Email** field, enter your website administrator's email address. This address does not appear on your site. However, if a user clicks the Report Abuse button on your site, your administrator automatically receives an email notification about the inappropriate activity.

   c. In the **Confirmation Message** field, enter the text to appear for a site user who clicks the Report Abuse button. The default text is "This page has been reported to the administrator."

6. Click **Save**. You return to *Parts*.

Comments Page Elements

To allow page owners to add a comments section to their personal page, create a Comments page element type. When a personal page has this functionality, friends and family of the personal page's "owner" can post comments, public or private, to the page.

Note: Website users with supervisor rights can edit and delete posts for the Comments page element.

▸ Design Comments for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "Comments" in the **Display As** field.

Note: You can include the Comments page element in a Personal Page Elements part.

2. In the **Display Name** field, enter a name for the comments section on the page.
3. In the **CSS** box, enter Cascading Style Sheets (CSS) text to override the default style of this element.

   Use CSS text to create unique elements, such as to change the text on the **Post a Message** button. CSS is easier to use than other methods, such as HTML. Unless you specify a custom style sheet, your website uses default style sheets.

   For more information about CSS, see the *Website Design Guide*.

4. Under **Details**, in the **Default Title** field, enter a title for your comments box on your website.

   a. In the **Button Caption** field, enter a label for the button that website users click to post a comment.

   b. To allow visitors to create private comments, select **Allow Private Messages**.

   c. To display dates for comments, select **Display** under **Date Column**.

      In the **Caption** field, enter a column header. The default header is **Date**.

   d. To display comments, select **Display** under **Message Column**.

      In the **Caption** field, enter a column header. The default header is **Message**.

e. To display the names of comment authors, select **Display** under **Author Column**.

In the **Caption** field, enter a column header. The default header is **Author**.

5. Click **Save**. You return to *Parts*.

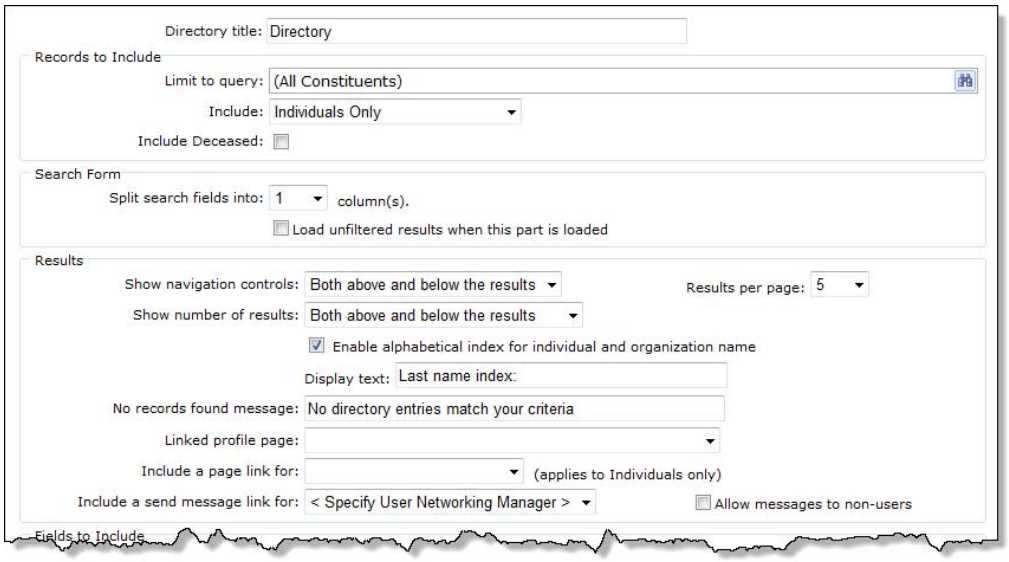
Directory Page Elements

To allow chapter managers to access directories on chapter pages, use the Directory page element type. This directory contains a list of the names in the Members role in the Chapter Manager part. For more information about this role, refer to the *Chapter Management Guide*.

Design Directory for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, in the **Directory title** field, enter a name for the directory, such as "Class of 2000 Directory."



2. Under **Records to Include**, specify the records to include in the directory search results.

a. The **Limit to query** field displays the selected query of records included in the directory. By default, "All Constituents" appears.

Tip: For a query to appear as a selection, you must first create it in Blackbaud CRM. When you create a query, you may need to refresh the website for it to appear as a selection. To refresh, select **View**, **Refresh** from the menu bar.

To include information from all constituents in your database, leave the default "All Constituents." To select another existing constituent query to use as the directory, click **Change**. The Query Search screen appears.

For information about how to use the Search screen, see the *Program Basics Guide*.

b. In the **Include** field, select the type of constituent records to include in the directory search results. You can select "Both Organizations & Individuals," "Individuals Only," or "Organizations Only."

c. To include deceased constituents in the directory search results, select **Include Deceased**.

3. When you use the Academic Catalog in Blackbaud CRM, an **Education Fields** section appears. In the **Include** field, select whether to include academic information from affiliated educational institutions only or both affiliated and unaffiliated institutions for the search and results filters.

Tip: To improve search performance, narrow the volume of institutions to search by selecting "Affiliated educational institutions" in the **Include** field. After you save the part, you cannot change your selection in this field.

In addition to this section, more educational fields are available to integrate Academic Catalog data with this part on your website. Under **Available Fields**, in the **Additional Information** nodes for **Primary Alumni** and **Education History**, the **College/School**, **Division**, **Department**, **Sub Department**, and **Degree type** fields appear to support the integration. When you use these fields, website users can search and view the information in the directory display window for affiliated and unaffiliated institutions, depending on the selection you make in this section. For example if you select "Affiliated educational institutions" and include the **Department** field, users can narrow their search by selecting a department and then view the information in the search results for affiliated institutions only. Also, you can use the **Program** and **Degree** fields under the **Primary Alumni** and **Education History** nodes to search and display this data for affiliated and unaffiliated institutions.

Note: When you enable or disable the Academic Catalog in Blackbaud CRM and then add or remove Academic Catalog fields on the part for your web page, the changes do not reflect on your website for approximately 20 minutes.

4. Under **Search Form**, in the **Split search fields into** field, select how many columns of search fields to appear in the criteria table. You can display up to five columns.

   To process a search while the user browses your Directory part, select **Load unfiltered results when this part is loaded**. When you select this checkbox, the directory search processes before the user enters criteria and clicks **Search** on your website.

5. Under **Results**, set up how search results appear on your Directory part.

   a. In the **Show navigation controls** field, select whether the navigation buttons should appear above the results, below the results, or both above and below the results.

   b. The directory search can return up to 500 results that match the criteria entered by a site user. In the **Results per page** field, select the maximum number of results to appear on a page when a site user searches the directory. You can display up to 50 results per page.

   c. You can include in the search results the total number of records that met the user's search criteria. In the **Show number of results** field, select whether to display the total number of results above the results, below the results, or both above and below the results.

   d. In the **No records found message** field, enter the message to appear if no records meet the search criteria the user enters to search the Directory on your website. By default, the message "No directory entries match your criteria" appears.

   e. Directory results can link to a page containing a Profile Display part. In the **Linked profile page** field, select the page to link to. The field you list first in the **Listing Fields** box becomes the link to the page you select in **Linked profile page** field.

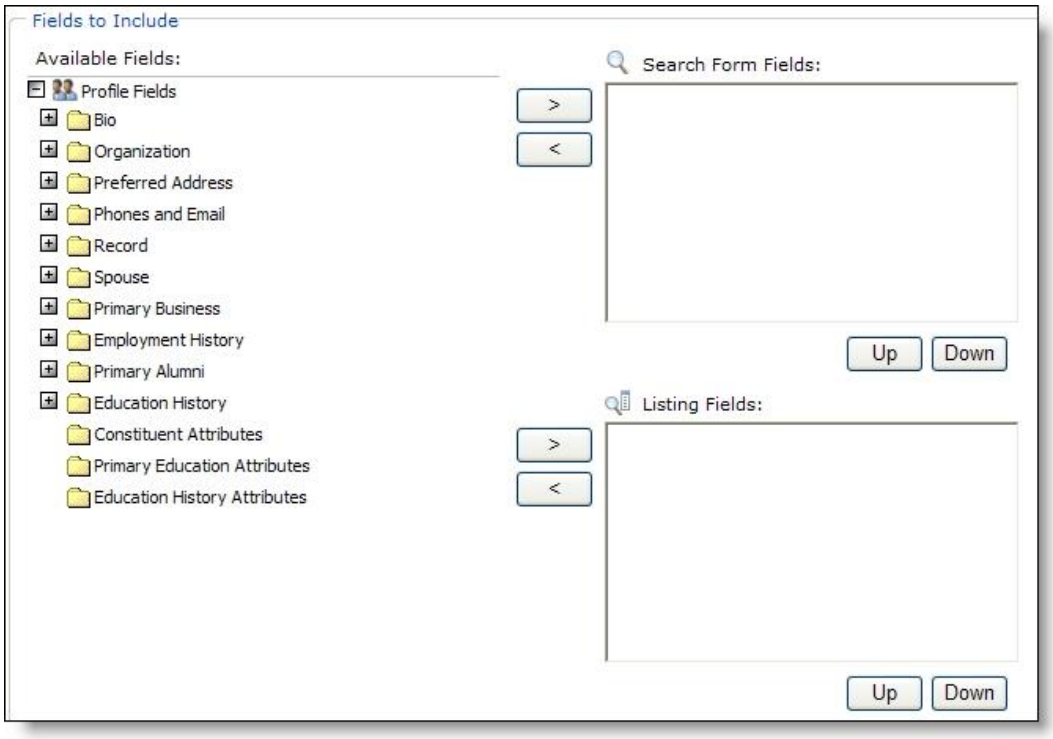
   f. To allow website users to send personal messages to constituents in the results, in the **Include a send message link for** field, select the User Networking Manager part to link to the directory results.

Note: If constituents opt out of email in Blackbaud CRM, website users can send them personal messages through the user networking site, but they cannot send them email messages.

g. To allow website users to send personal messages through the User Networking Manager part to constituents who are not registered website users or who are registered but are not members of the user networking site, select **Allow messages to non-users**.

Warning: Constituents who do not have user networking accounts receive personal messages through email. To allow users to send email messages to these constituents, you must enable a Directory Message Notification in *Email* and select the User Networking Manager part for it. Without this notification, your users will not be able to send messages to constituents who are not registered website users or to constituents who do not have social networking accounts. For more information about notifications, see the *Email Guide*.

6. Under **Fields to Include**, select the fields the user uses to search the directory, such as **First Name** or **Last name**. Right-click and drag the field from the **Available Fields** box to the **Search Form Fields** box, or select the field in the **Available Fields** box and click the right arrow to move it to the **Search Form Fields** box.



When you integrate with Blackbaud CRM, do not include the **Business.County** or **PreferredAddress.County** field in the **Search Form Fields** box. Blackbaud CRM does not support these fields in a directory search.

Note: The system administrator selects the attributes available on the Settings tab on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*.

To arrange the placement of a field in the **Search Form Fields** box, select the field and click the **Up** or **Down** button.

Note: The fields in the **Search Form Fields** list and the **Listing Fields** list do not have to match.

7. Select the fields to appear when the search finds a match. To select a field, right-click and drag it from the **Available Fields** box to the **Listing Fields** box. To move a field from the **Available Fields** box to the **Listing Fields** box, you can also select it and click the right arrow.

To arrange the placement of a field in the **Listing Fields** box, select the field and click the **Up** or **Down** button.

Warning: The listing field you put first for results acts as a link to the constituent record. However, if, on the Profile Form, the field's data is marked **Privacy edit** and the user selects to hide the data, no link exists. For example, if you select to list **First name** first, and the user selects to hide **First name** data, no link appears.

While you can link every field, the field you place first in the **Listing Fields** box automatically links to the page you select in the **Linked Page** field. For example, you select to display the alumni's last name, first name, birth date, address, and whether the user wants to receive email. In this case, the last name is the link. When results appear, to indicate the last name is a link, it is underlined and changes color when you drag your mouse over it. When a website user clicks the alumnus's last name, the published profile information for that constituent appears.

8. Click **Save**. You return to *Parts*.

Event Calendar Page Elements

To include a calendar on your chapter site, create an Event Calendar page element type. Managers use the calendar to post event dates and information to a web page.

Design Event Calendar for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, under **General options**, enter a name for the calendar in **Calendar title** field.
2. Under **Default display**, select the default view of the calendar. You can select **Calendar view** or **List view**. The website user can always select a different view when they open the calendar.
3. Under **Uncategorized events management rights**, select the roles with rights to manage any events not associated with a category.
4. Under **Event Categories**, select the event categories to associate with the calendar. After you add a category, click **Assign rights to the category**. The Event Category Security screen appears so you can assign rights to users and roles for the event category. For example, a Soccer calendar may have the Registration, Practice, and Games categories, and only users in the Coaches role can add, edit, or delete events in these categories. Also, when the coach adds a new event, they can assign its category from those you select for the calendar. For example, the coach specifies whether the new event is Registration, Practice, or Games. You can use these categories to filter the types of events that appear in calendar groups and calendar highlights. For example, you can set a calendar highlights part to display only events included in the Game category. For information about how to add event categories, see the *Administration Guide*.
5. To include a weblog for the Event Calendar part, select **Enable RSS**. Additional fields for the weblog appear.
   a. In the **Date format** field under **Appearance**, select a date format for the weblog.
   b. Under **RSS publishing properties**, in the **Title** field, enter a title for the weblog.
   c. In the **Link URL** field, enter a website address news readers can use to link to the calendar weblog. Also, if your website has a News Reader part, add this link to your news reader so it displays new events when they are posted. For more information about the News Reader part, see News Reader on page 89.

d. In the **Description** field, enter a description for news readers about the types of events posted on the calendar. For example, if your organization supports the environment, enter "Upcoming Local and National Events Supporting the Environment."

e. In the **Copyright** field, enter a copyright notice for the weblog, if you have one.

f. In the **Editor's email** field, enter the email address for the person responsible for the content of calendar postings.

g. To approve weblog posts before they appear on your site, select **Moderated**.

6. To add a picture to the calendar weblog, click **Select Image** under **Image properties**. The Select Image from Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.
7. In the **Link URL** field, enter the web address to open when a user clicks the image. The link can access another page on your site or an outside website.
8. Under **Security rights**, define the roles with post and manage rights for the published events.

a. In the **Post** column, select the checkbox to assign post rights for users and roles allowed to post to the weblog. This does not include rights to edit or delete postings.

Note: If the list is marked **Moderated**, posts are pending until a user with Manage rights approves them. A user with Post rights views his or her pending posts, but not those of other Post users. Only users with Manage rights view all pending posts.

b. In the **Manage** column, select the checkbox to assign manage rights for users and roles allowed to add, edit, and delete weblog postings. If the list is marked **Moderated**, this grants rights to approve postings.

c. To include additional users and roles, select **Add users and roles**.

9. Click **Save**. You return to *Parts*.

News Page Elements

When you add a News page element type to a personal page, users can include news on their page. For example, a user who is ill creates a personal page that contains a News page element part. She can write her own news article about her sickness for the personal page, or she can include links to news articles from other websites to create awareness about her type of sickness.

▸ Design News for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "News" in the **Display As** field.

Note: You can include the News page element in Chapter or Personal Page Elements parts.

2. In the **Display Name** field, enter a name for the news section on the page.
3. Under **Details**, in the **Title** field, enter a title for your news weblog. This name appears on the personal page.

a. In the **Link URL** field, enter the website link that news readers such as *NewsGator* use to link to your site. This link should direct the website user to your news weblog or a general information page about your organization.

b. In the **Description** field, enter any additional information as required. For example, if your organization supports the environment, enter "Check weekly for updates." To view the information you enter in this field, click **XML** for the weblog. For this example, the XML information for your description reads "<description>Check often for weekly updates</description>."

c. In the **Copyright** field, enter a copyright notice for the news, if you have one.

d. In the **Editor's Email** field, enter your email address or the person who is responsible for the content of your weblog.

4. Under **Image Properties**, click **Select Image** to add a picture. The Select Image From Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.
5. In the **Link URL** field, enter a link to another website so you can share valuable information from that website with your site users.
6. Under **Security Rights**, to assign your website members rights to edit the news weblog posts, select **Allow members to add, edit, and delete posts?**
7. Click **Save**. You return to *Parts*.

News Reader Page Elements

With the News Reader page element type, you can display Really Simple Syndication (RSS) content or Atom content on personal pages. These are XML-based formats used to distribute web information. For example, if your organization is health related, users can create a personal page for health tips and include a News Reader part that displays news headline feeds from other health related sites. With RSS or Atom and the News Reader part, you can include these headlines on personal pages automatically.

▸ Design News Reader for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "News Reader" in the **Display As** field.

Note: You can include the News Reader page element in Chapter or Personal Page Elements parts.

2. In the **Display Name** field, enter a name for the news reader section on the page.
3. In the **Feed URL** field, enter the website address that contains the XML content to display on your website. Typically, sites that share this content display an orange XML icon that is a hyperlink to their website's feed.

Note: The website supports RSS versions 0.9, 1.0, and 2.0, and Atom version .3.

4. In the **Display only the [ ] most recent articles** field, enter the number of recent articles to display on your news reader. For example, to display five articles, enter "5." To display all recent articles, leave the default "0" in the field.
5. To display the XML content on multiple pages, select **Use paged output, with [ ] articles per page**. In the field, enter the number of items per page.

   If you do not select this checkbox, the articles display on one web page.
6. To display only the article title, select **Display only the headlines in this feed**.

   If you do not select this checkbox, the complete article appears on the news reader.

7. To display the graphic associated with the website feed, select **Display any graphic associated with this feed**.
8. To include the date the feed posts to your website, select **Display the date for each posting, if available**.
9. For a website that requires authentication to access its XML content, enter the authentication information under **News Reader Authentication**.
    a. In the **Type** field, select the authentication type that the news feed provider requires.

Note: Basic authentication does not encrypt the user name and password and sends these credentials over the network in plaintext. Digest authentication encrypts the user name and password and does not send them over the network in plaintext.

    b. In the **Username** and **Password** fields, enter your authentication information. To display XML content that requires authentication, you must have a user name and password with the news feed provider.
10. Click **Save**. You return to *Parts*.

Page Links Page Elements

For users who have multiple personal pages, you can add Page Links to a personal page element to create a list of links to the personal pages that are public.

Design Page Links for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select “Page Links” in the **Display As** field.
2. In the **Display Name** field, enter a name for the personal page element.
3. In the **CSS** box, enter Cascading Style Sheets (CSS) text to override the default style of this element.

    Use CSS text to create unique elements, such as a border around an image. CSS is easier to use than other methods, such as HTML. Unless you specify a custom style sheet, your website uses default style sheets.

    For more information about CSS, see the *Website Design Guide*.

Note: You can include the Page Links page element in a Personal Page Elements part.

4. In the **Default Title** field, enter a default title for the list of links.
5. Click **Save**. You return to *Parts*.

Photos Page Elements

To upload graphics for a personal page, create a Photos page element. You can upload graphics for individual use on a personal page, or you can upload a series of graphics to create a slideshow. Your organization can upload all the graphics for personal pages and allow a user to select the images she wants, or you can allow a user to upload an image of her choice. When you create a Photos page element, you must select a default image to appear on the page. If a user does not upload an image to the Photos part on her personal page, the default image appears.

Design Photos for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "Photos" in the **Display As** field.

Note: You can include the Photos page element on a Chapter or Personal Page Elements part.

2. In the **Display name** field, enter a name for the photos section on the page.
3. In the **CSS** box, enter Cascading Style Sheets (CSS) to override the default style of this element.

   Use CSS to create unique elements such as a border for images. CSS is easier to use than other methods such as HTML. Unless you specify a custom style sheet, your website uses default style sheets.

   For information about style sheets, see the *Website Design Guide*.
4. Upload each image.
   a. Under **Details**, click **Add Image**. The Select From Image Library screen appears. For more information about how to upload an image, see the *Program Basics Guide*.
   b. To designate the default image that appears when users do not select one, select **Default**.
5. Under **Slideshow Options**, select whether to allow website users to add slideshow captions, enter a default caption, and enter how long to display images during the slideshow.
6. Under **Image Options**, enter the maximum dimensions for a slideshow image in the **Maximum height/width** field. This limit defines the height and width of the boundary that contains images but does not directly alter the size of images.

   Warning: An image's number of pixels cannot exceed the number you enter in the **Maximum height/width** field. For example, if you have an image that is 200 pixels and set this boundary to 500 pixels, the image does not increase to 500 pixels. Conversely, if you have an image that is 500 pixels and set the height/width size to 200, the image shrinks to fit that boundary.
7. In the **Image tags** field, select the tags to associate with images. Tags are keywords or phrases to identify an image's content. To create a tag for slideshow images, enter it in the **And/or new tag** field. For more information about tags, see Tags Tab on page 15.
8. Click **Save**. You return to *Parts*.

Profile Page Elements

To allow personal page owners to create profiles of the individuals who visit their personal pages, add a Profile page element to a Personal Page Element part.

Design Profile for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "Profile" in the **Display As** field.

Note: You can include the Profile page element in a Personal Page Elements part.

2. In the **Display Name** field, enter a name for the profile section on the page.
3. To format the email content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
4. Click **Save**. You return to *Parts*.

Rich Text Page Elements

To add a hypertext link, a remote photo hosted on another server, or formatted text to a personal page, create a Rich Text page element. When you add include the Rich Text page element, remember that it provides a lot of power to the owner of the page. The program automatically removes IFRAME and SCRIPT tags from Rich Text page elements, but the potential remains for site abuse. With a Rich Text page element, page owners can link to or display inappropriate content. However, visitors of the page cannot edit the page element. When you use the Rich Text page element for remote photos, you can only link to an existing image URL. You cannot upload images.

Design Rich Text for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "Rich Text" in the **Display As** field.

Note: You can include the Rich Text page element in a Chapter or Personal Page Elements part.

2. In the **Display Name** field, enter a name for the rich text section on the page.

Note: Details are not available for the Rich Text page element because it is not editable for visitors of the personal page.

3. Click **Save**. You return to *Parts*.

Text Page Elements

To allow users to enter general content text on a personal page, create a Text page element.

Design Text for Page Elements

For information about page element parts, see Page Element Types on page 90.

1. From the Design tab, select "Text" in the **Display As** field.

Note: You can include the Text page element in a Chapter or Personal Page Elements part.

2. In the **Display Name** field, enter a name for the text section on the page.
3. In the **CSS** box, enter Cascading Style Sheets (CSS) text to override the default style of this element.

   Use CSS text to create unique elements such as colors, fonts and styles, and spacing for your part. CSS is easier to use than other methods, such as HTML. Unless you specify a custom style sheet, your website uses default style sheets.

   For more information about CSS, see the *Website Design Guide*.
4. Under **Details**, in the **Maximum Length** field, enter the maximum number of characters for the customizable text.
5. In the **Default** box, enter any default text to include in the part, such as a welcome message. The maximum number of characters count includes the text you enter in this field.
6. Click **Save**. You return to *Parts*.

Page Sharing

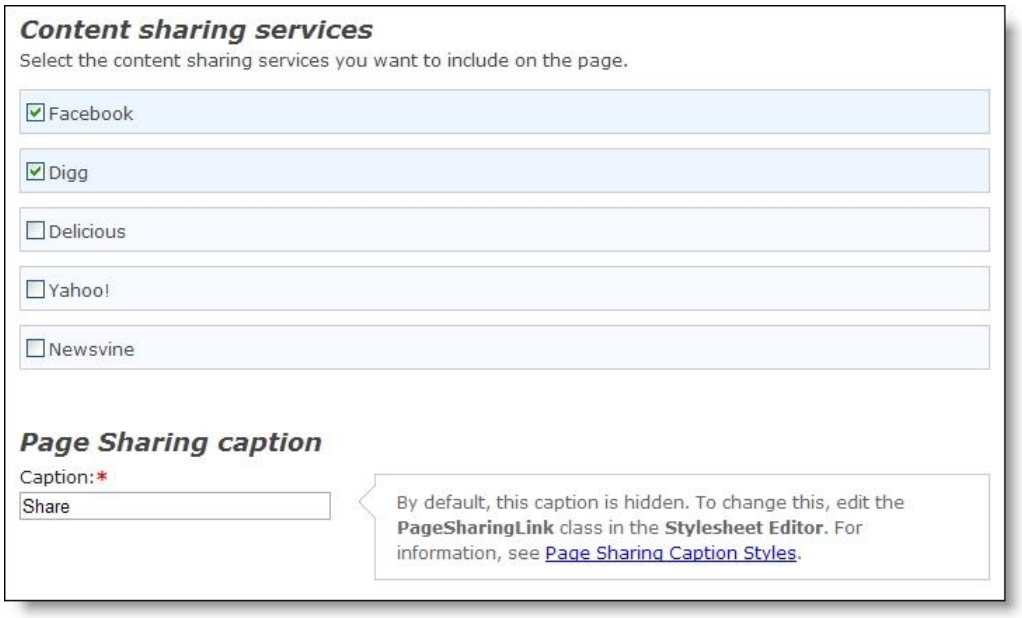
To allow website users to easily notify others about content on a web page, add a Page Sharing part to a layout or template. Using this part, website users can use content sharing services such as *Digg* or *delicious* to send a link to a web page to others and help promote your website. On your website, the website user selects the sharing service from the page sharing caption and enters information about the sender and recipient and a personal message for the recipient.

Warning: To prevent website users from sharing content that recipients may not be able to view, we recommend you not add the Page Sharing part to pages that require specific security or contain dynamic content such as Directory part search results.

Design Page Sharing

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Content sharing services**, select each social networking method, such as *Digg*, that website users can use to share content on the web page.



2. Under **Page Sharing caption**, enter a caption to appear with the links that website users click to share the web page.

Note: By default, the page sharing caption is hidden. To display the caption, you must edit its classes in *Style sheets*. For information about how to style the caption, see Page Sharing Caption Styles on page 103.

3. Click **Save**. You return to *Parts*.

Page Sharing Caption Styles

By default, the page sharing caption is styled to be invisible on your website. To display a caption that website users can expand to display the selected sharing services, you must edit its classes in *Style sheets*. In *Style sheets*, you can also specify whether the services appear horizontally or vertically.

Adjust the style sheet to display the page sharing caption

1. From *Site explorer*, click **Style sheets**. *Style sheets* appears.
2. Select a style sheet and click **Click here to edit this style sheet** under **Action**. The Style sheet text editor screen appears.
3. To load the Page Sharing CSS selectors that allow you to edit the appearance of the part on your web pages, click **Insert CSS selectors**. The Insert CSS Selectors screen appears.
4. In the **Insert selectors for** field, select Page Sharing. To include the Page Sharing default style settings along with the names, select **Include defaults**.
5. Click **Insert**. You return to the style sheet editor, and the Page Sharing selectors appear in a new section within the editor.
6. Enter the styles to display the caption users can expand and collapse.
   a. Under **.PageSharingLink**, enter display:block.
   b. Under **.PageSharingLinkImage**, enter display:block.
   c. Under **.PageSharingList**, enter display:none.
7. By default, when website users expand the list at the caption, sharing services appear horizontally. To display the sharing services vertically:
   a. Under **.PageSharingListItem**, enter float:none.
   b. Under **.PageSharingListItemLinkImage**, enter float:none;display:inline.
8. To apply your changes, click **Apply**. The styles apply to all layouts, templates, and web pages that use the style sheet.
9. To save your changes, click **Save**. You return to *Style sheets*.

Payment

With the Payment part, website users can pay for multiple transactions with a single charge. For example, when a user registers for an event or makes a donation, the program adds the transactions to a payment page. If the user leaves the website without paying, the transactions remain on the payment page. To clear unpaid payment pages that have not been modified within a specified time period, you can set an expiration date.

Note: Anonymous website users can create payment pages. When an anonymous user adds a transaction to a payment page, the page remains after the user leaves the website. To identify anonymous users, the program uses cookies. To access a payment page, an anonymous user must use the same computer used to add the transactions. If multiple anonymous users add transactions from the same computer, the program adds the transactions to the same payment page.

You can use a payment page with the Donation Form and Event Registration Form parts. Before you can add a payment page to these parts, you must add a Payment part to a web page. To add a payment page to these

parts, you select a web page with the desired Payment part. For information about the Donation Form part, see Donation Form on page 39. For information about the event registration form, see Event Registration Form on page 59.

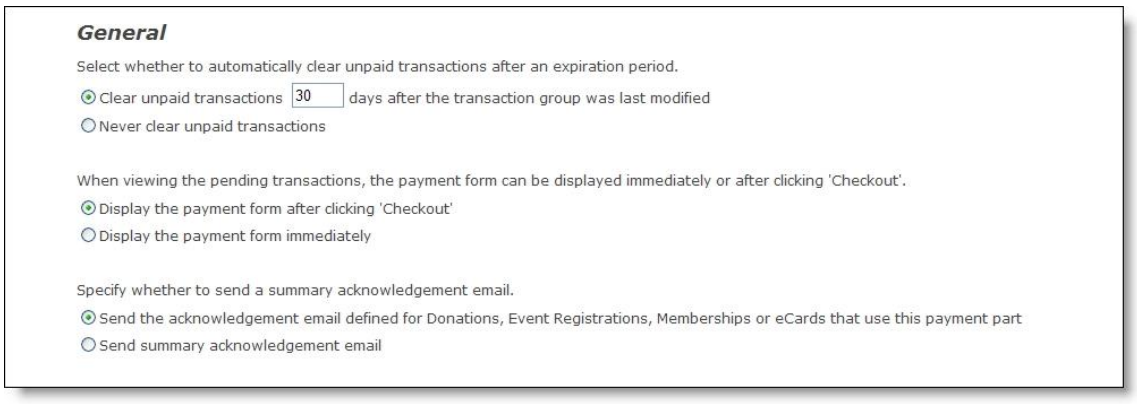
When you add a payment page to a donation form or event registration form, the user does not proceed directly to payment. Instead, the program adds items to the payment page. When the user clicks **Continue** on the form, the payment page appears with the new item. The Payment part determines the available payment methods and the merchant account. To provide a link on your website for users to access payment pages without adding items, use the Payment Summary part. For information about the Payment Summary part, see Payment Summary on page 106.

Note: To design, style, and test a part on your website without creating transactions, generating emails, or communicating in any way with Blackbaud Services or Blackbaud CRM, select **Test Mode** on the Properties tab. For example, you can complete the fields on a Payment form to ensure the confirmation page is styled and working properly. Although you submit the payment and receive a confirmation, a transaction does not appear on the Web Transactions page in Blackbaud CRM. Use Test mode to verify the user's experience, *not* to test data processing. Test mode does not validate credit card numbers and merchant accounts. Only users with supervisor rights can view parts in Test mode.

Design Payment

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General**, set an expiration date for payment pages.
   - To clear unpaid payment pages that website users have not modified, select **Clear unpaid transactions** and enter the number of days to wait before you clear the pages.
   - To keep all payment pages regardless of when last modified, select **Never clear unpaid transactions**.



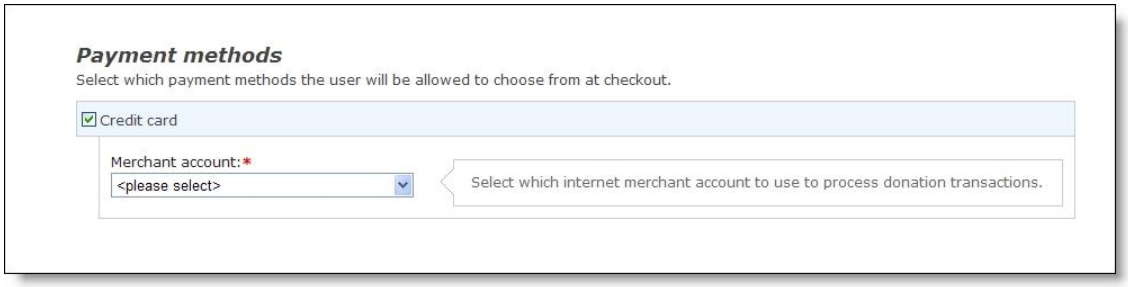
2. Select when to display the payment form for users to enter payment information.
   - To display the payment form on the payment page, select **Display the payment form immediately**.
   - To display the payment form on a separate page, select **Display the payment form after clicking 'Checkout'**.
3. You can determine if a donor receives a summary email to acknowledge one or more payments made with this Payment part or individual acknowledgement emails for each payment.
   - To send a summary acknowledgement email for donations and event registrations a donor pays for with this Payment part, select **Send summary acknowledgement email**.

Note: From a Donation or Event Registration part, you can choose to always send the acknowledgement email defined for the part. If you add a Payment part with **Send summary acknowledgement email** selected to one of these parts, the donor receives the acknowledgement email you designed for the donation or event registration, as well as the summary acknowledgement email you defined for the Payment part.

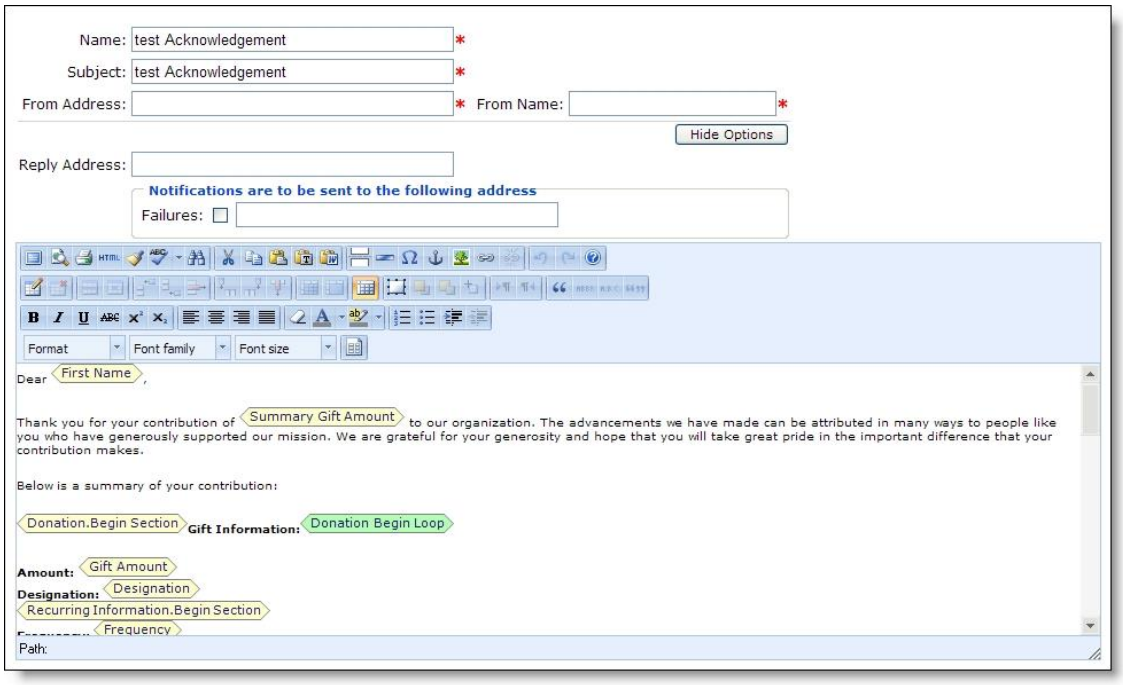
- To send donors an acknowledgement email for each payment, select **Send the acknowledgement email defined for Donations or Event Registrations that use this payment part**.

4. Under **Required Fields**, select the checkbox for each donor field to make required on the payment page. To ensure you download complete constituent information, we recommend that you make all these fields required.

5. Under **Payment Methods**, select the payment methods to offer to website users.



6. Under **Merchant Account**, select the merchant account to use to process credit cards. For example, select your IATS account. The system administrator sets up merchant accounts in *Administration*. For information, see the *Administration Guide*.
7. Click **Next**. The Acknowledgement Email screen appears.



8. Create an acknowledgement email for website users who make a payment with this Payment part. You can use the default text provided or enter different text. For information about how to design an email acknowledgement, see the *Email Guide*.

Note: You must select **Send summary acknowledgement email** under **General** for donors to receive the summary email you create for the Payment part. For information about how to send both a summary and individual acknowledgement emails, see the *Email Guide*.

The summary acknowledgement email includes loop merge fields for donations and event registrations. For information about how to use loop merge fields, see Event Registration Loop Merge Fields on page 66.

Tip: When you edit a Payment part, you can click **Acknowledgement Email** to access the Acknowledgement Email screen. For information about how to create this email message, see the *Email Guide*.

9. Click **Save**. You return to *Parts*.

Payment Summary

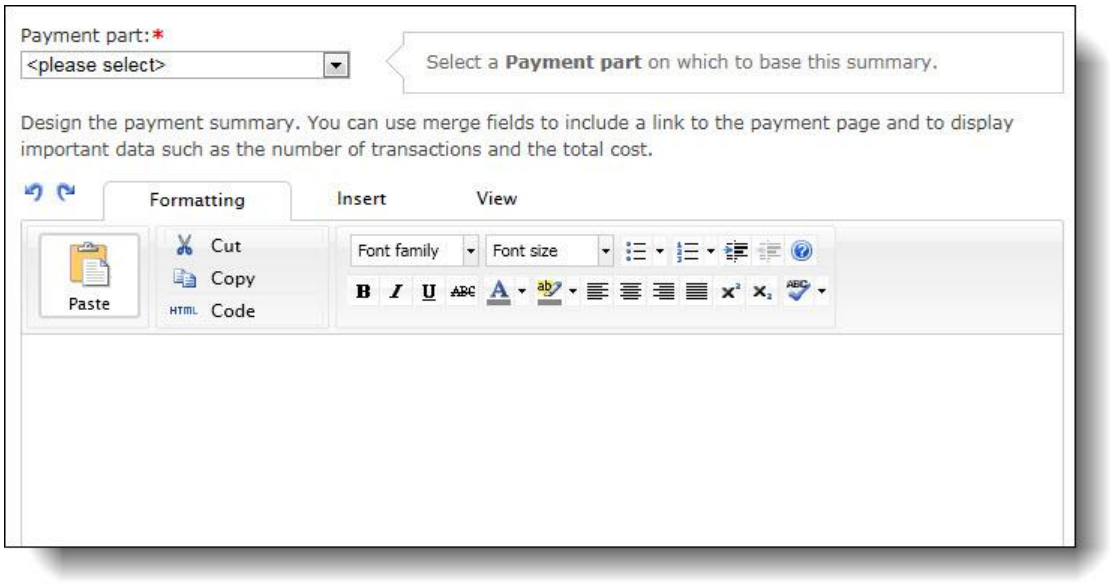
With the Payment Summary part, website users can view useful information about their payment pages. The payment summary can display the number of items on a payment page and the total cost for the items. It can also provide a link to view the payment page and pay for transactions. When you add a link and place the summary on a page template, a website user can access the payment page from any web page that uses that template. You can also use merge fields to create two versions of the summary: one for an empty payment page and one for a page with transactions.

When you create a payment summary, you select a Payment part to connect to the summary. For information about the Payment part, see Payment on page 103.

Design Payment Summary

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Payment part** field, select the Payment part to connect to the summary.



2. Under **Display text**, enter the text to appear in the payment summary. You can use merge fields to display the number of transactions on a website user's payment page and the total cost, as well as to provide a link to the page. You also can use merge fields to create conditional statements that appear according to whether the payment page contains transactions. To format the content's appearance and layout, use the HTML editor.

   For more information about the HTML editor, see the *Program Basics Guide*.

3. Click **Save**. You return to *Parts*.

Payment 2.0

With the Payment 2.0 part, website users can pay for multiple transactions with a single charge. For example, when users register for events or make donations, the program can add the transactions to their shopping carts. If users leave the website without paying, the transactions remain in the shopping carts.

Note: Website users who do not log in to your site can still add items to shopping carts. To identify these anonymous users, the program uses cookies. To return to their shopping carts, users who did not log in must use the same computer as when they added transactions. If multiple users add transactions from a computer without logging in, the program adds all the transactions to a single shopping cart.

The Payment 2.0 part shopping cart can process transactions for the following parts. It cannot process transactions from other sources.

- Advanced Donation Form
- Donation Form
- eCards
- Event Registration Form
- Membership
- Transaction Manager (for unpaid event registrations only)
- Sponsorship Form

After you place the Payment 2.0 part on a web page and route transactions to the shopping cart for other parts that integrate with Payment 2.0, the parts then send users to the shopping cart during transactions and the Payment 2.0 part determines the merchant account and available payment methods. After users add items to the shopping cart, they can click links to edit individual transactions. When users pay with credit cards, the program collects user information on secure payment pages to help you comply with the Payment Card Industry Data Security Standard (PCI DSS).

Design Payment 2.0

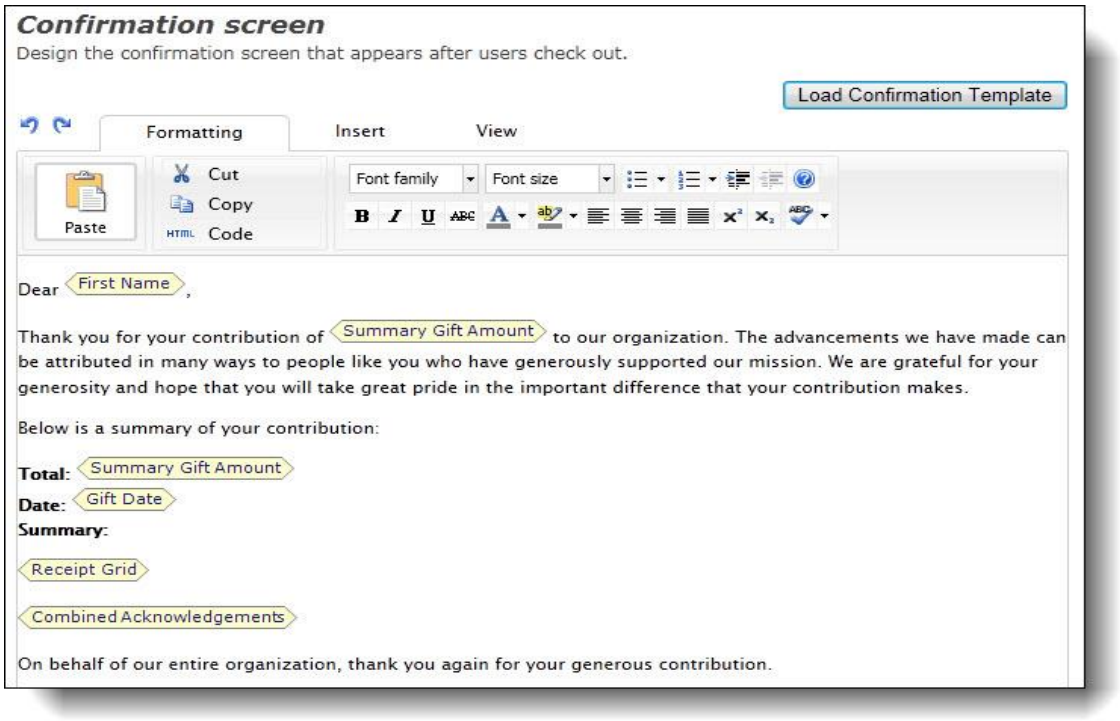
For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General**, enter how long to maintain shopping carts for users who add transactions but do not log in to your website.

Warning: If you enter "0" in the **Days to keep anonymous carts** field, the program does not maintain cookies to identify users who are not logged in. If one of these anonymous user adds items to a shopping cart and does not check out, the user cannot return to the cart later. Depending on the browser, the cart is cleared either when the browsing session times out or when the user closes the browser.

For registered users on your website, the Payment 2.0 part maintains shopping carts until they process the items in their carts. However, the program can remove individual items such as event registrations when the parts place time limits on how long the items can remain in shopping carts.

2. Under **Confirmation screen**, design the payment summary that appears after user check out in the shopping cart.



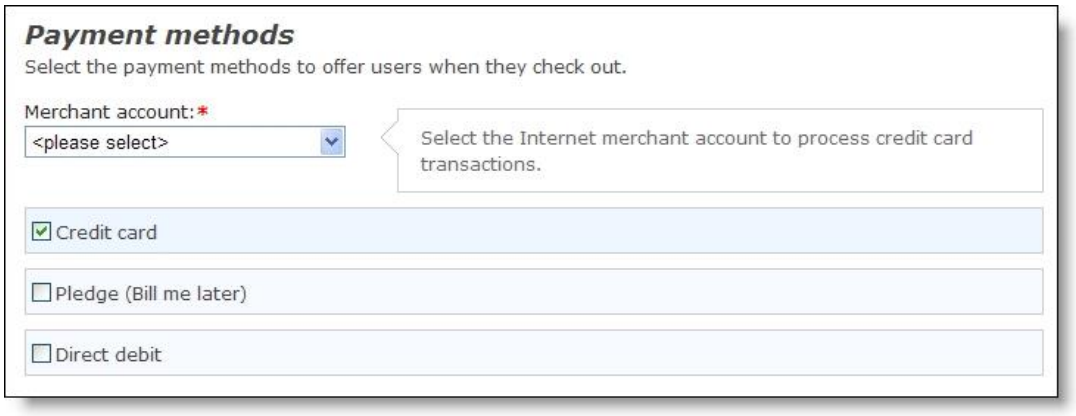
In the HTML editor, enter content for the payment summary and format the appearance and layout. To include personalized information, use merge fields. To remove the changes you make to the default confirmation screen, click **Load Confirmation Template**.

For more information, see the *Program Basics Guide*.

3. Under **Required Fields**, select the checkbox for each field to make required on the payment form. To ensure you download complete constituent information, we recommend that you make all these fields required.

4. Under **Payment methods**, select the payment methods to offer to website users. You can allow users to pay with credit card and direct debit, or to make pledges to pay later.

Warning: If you do not select **Credit card**, the Payment 2.0 part cannot process event registrations because the Event Registration Form part only accepts credit card payments. In this scenario, you must either select additional payment methods or direct event registration transactions to other Payment 2.0 parts.

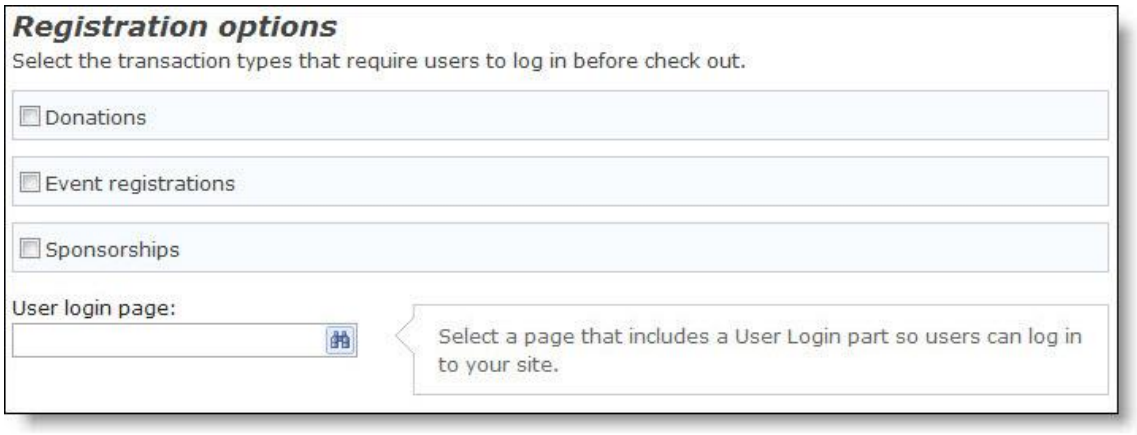


Note: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the Payment 2.0 part directs users who pay with credit cards to the secure payment page to process payments. It does not direct users to this page when they make pledges or pay with direct debit. For information about the secure payment page, see Secure Payment Page on page 112.

5. In the **Merchant account** field, select the merchant account to use to process credit card transactions. For example, you can use your organization's Blackbaud Merchant Services account. The system administrator sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

Warning: If you create multiple Payment 2.0 parts for your website, you should use the same merchant account for each part. If you use multiple merchant accounts and users purchase items through more than one Payment 2.0 part, the program processes all items with the merchant account for the last item. If you set up merchant accounts for different currencies, this means users may pay for some items with the wrong currency.

6. Under **Registration options**, select the transaction types that require users to log in before check out.



In the **User login page** field, select a page that includes the User Login part so users can log in to your site. We recommend the part does not enable **New user registration**. For more information about the User Login part, see User Login on page 180.

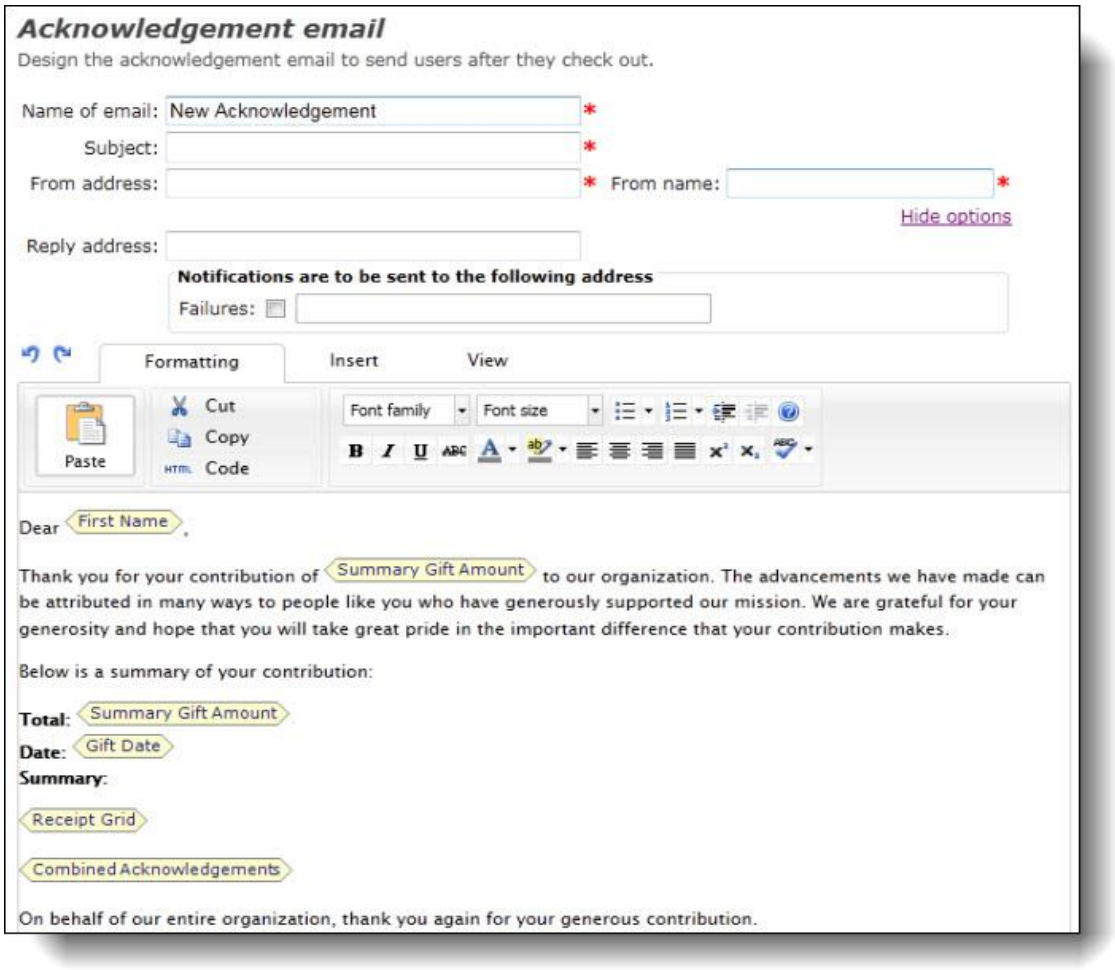
Note: If you select **Sponsorships** and new users register during sponsorship transactions, the program automatically creates constituent records in Blackbaud CRM. You do not process the signup transactions in batches because all sponsorship transactions are written directly to the database, including signup transactions. To link new website users to their constituent records, you must have a

default batch assignment setting for new user registrations in Blackbaud CRM. If not, new website user are not linked to constituent records.

When you require this, a message appears during check out to inform users they must log in. To do this, users click **Continue** and the user login page appears. Community members log in to your site with existing credentials and non-community members create a new user account. After the log in is complete, the program returns the user to the payment page to complete the check out.

Tip: To change the require message and **Continue** button text, select the Language tab. For more information about this tab, see Language Tab on page 10.

7. Click **Next**. The **Acknowledgement email** section appears.



8. Enter a name for the acknowledgement, a subject, and an address and name to include in the **From** field of the email message.
9. To receive responses from recipients at a different email address than the one you use to send the message, enter the return address in the **Reply Address** field.
10. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages for email messages that are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN).

11. In the HTML editor, enter content for the acknowledgement email message and format the appearance and layout. To include personalized information, use merge fields.

    For more information, see the *Program Basics Guide*.

    Note: You design acknowledgement messages for each part that routes transactions to a shopping cart. To include all these acknowledgements messages in the email message you design for the Payment 2.0 part, use the **Acknowledgement Block** merge field. For example, you can add the merge field to a Payment 2.0 part acknowledgement email message and then route transactions to the part from Donation Form parts. After website users check out, they receive a single Payment 2.0 acknowledgement email that includes acknowledgment messages from the Donation Form parts. You can also use this merge field on the Payment 2.0 part's confirmation screen.

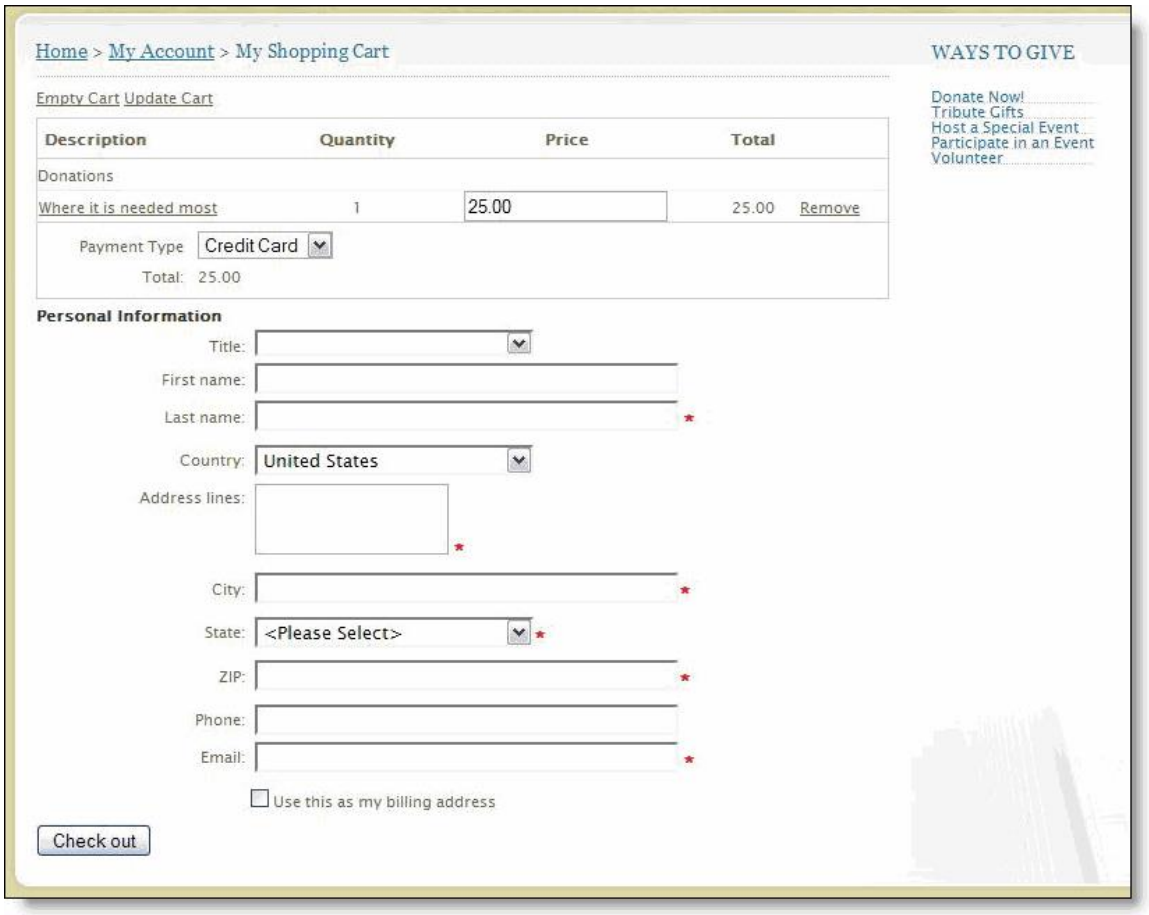
12. Click **Save**. You return to *Parts*.

Secure Payment Page

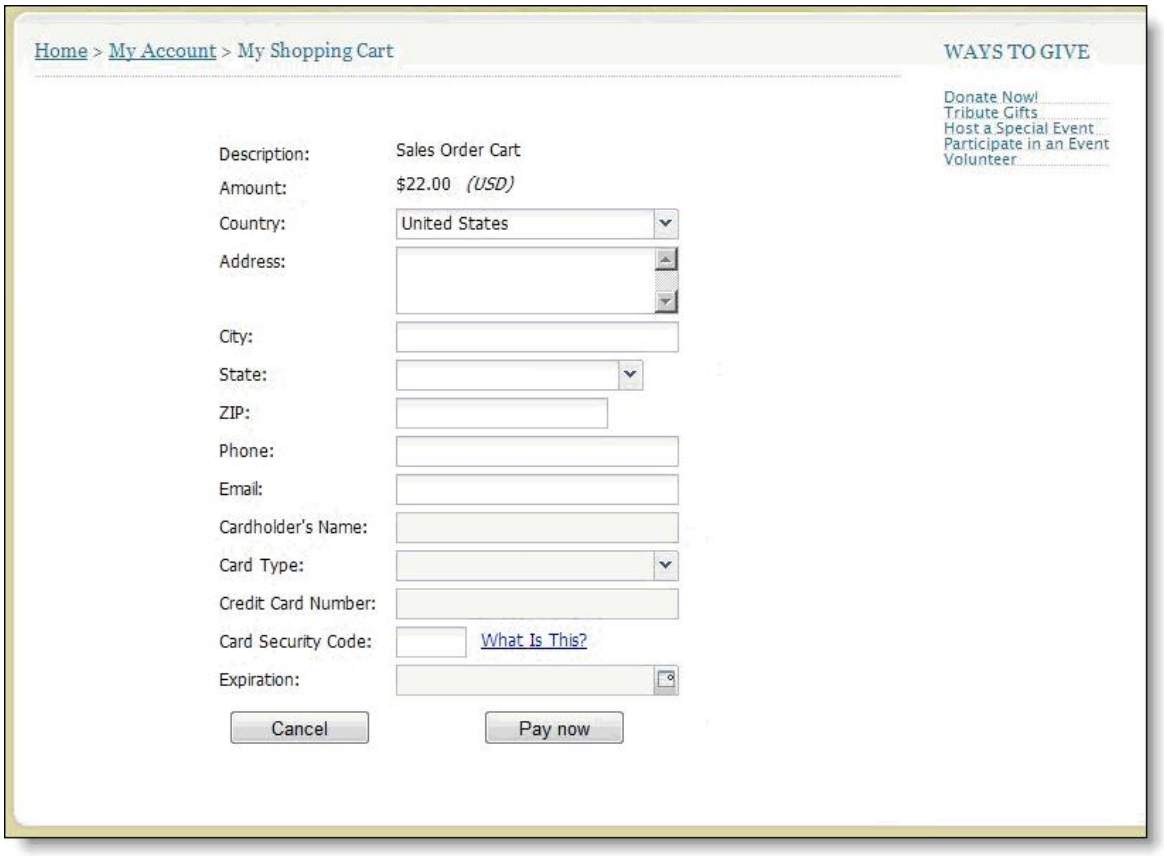
To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the program uses a secure payment page to process biographical billing information and payment information for the Advanced Donation Form, Membership Form, and Payment 2.0 parts. The program also uses it to secure credit card updates for the Transaction Manager part. Users enter the information on a secure payment web page that is hosted on a separate Blackbaud server from your website.

Note: Whether you host your site or Blackbaud hosts your site, the secure payment page on the hosted Blackbaud server processes all credit card payments for the Payment 2.0 part.

When a user submits a credit card payment on the Payment 2.0 part, the user navigates through a series of pages. First, a user enters the amount and biographical information on your site. When the page is complete, the user clicks **Check out**.



The program uses the style sheet, layout, template, and page for desktop browsers and mobile devices to display the secure payment page on the Blackbaud server. On this page, the user enters billing and payment information, such as credit card details.

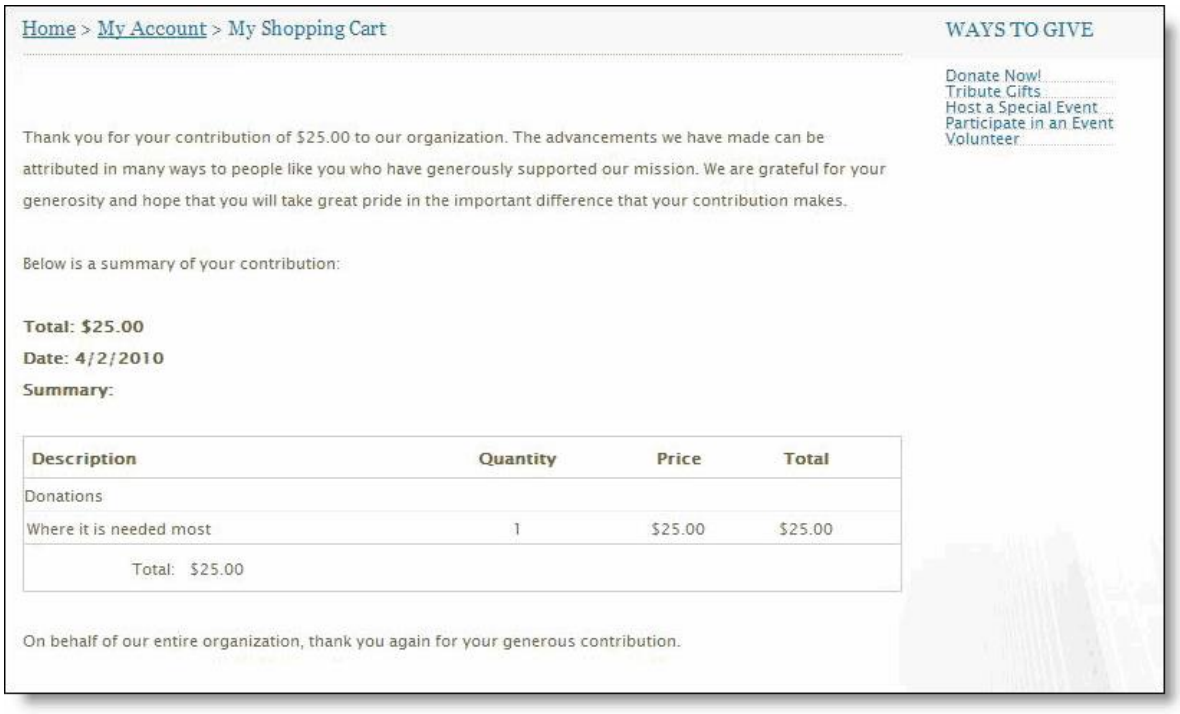


To complete the transaction, the user clicks **Pay now**.

Note: The secure payment page uses Blackbaud *Payment Service* to transmit the users's information and process the credit card transaction. For more information about Blackbaud *Payment Service*, see the *Payment Application Data Security Standards Implementation Guide*.

Warning: Your code tables in Blackbaud CRM for countries and their subdivisions, such as states and provinces, must follow the International Organization for Standardization's ISO 3166 standards. The secure payment page uses ISO 3166-1 for countries and ISO 3166-2 for subdivisions such as states. If your code tables do not match these standards, Blackbaud *Secure Payment* changes selections to the closest abbreviation when it processes transactions, and this can lead to incorrect address information. For example, if your countries table includes "United Kingdom," The secure payment page changes this to the United States abbreviation "US" because it is the closest abbreviation to "Un." In ISO 3166-1, the abbreviation for the United Kingdom is "GB," and your code table must match this. For information about how to edit your code tables in Blackbaud CRM for countries and their subdivisions, see the *Administration Guide*.

The user returns to your site and your confirmation page appears.



Secure Payment Page: Important Considerations

There are several important items to remember about the secure payment page for the Payment 2.0 part. The secure payment page uses your style sheets, layouts, templates, and pages for desktop browsers and mobile devices to render the page. Make sure you consider this information to enhance accessibility for both options.

- When you use the same Payment 2.0 part on two web pages that use two different templates, the secure payment page renders using the template for the page the website user navigates from. For example, your payment page for an event registration uses a template with a red background and your payment page for a donation uses a template with a blue background. When a user navigates from the event registration payment page to the secure payment page, the page renders using the red template. When a user navigates from the donation payment page to the secure payment page, the page renders using the blue template.
- Some parts, such as Formatted Texts & Image and Menu, appear on the secure payment page. Images also appear. However, you may notice that some parts, including Unformatted Text, do not appear on the page.
- When you include targeted content on your page, be aware that it does not apply to the secure payment page. No matter the role the user is in, the secure payment page renders the view for an anonymous user the same way your page appears for anonymous users. Anonymous users are users not logged in to your website.
- We recommend you remove parts that contain a Flash file. These files include JavaScript that the secure payment page removes for PCI DSS compliance. If you do not remove the part, an Adobe download message likely appears in its place on the secure payment page.
- Likewise, we recommend you remove graphics that include JavaScript. The secure payment page removes these graphics for PCI DSS compliance. If you do not remove the graphic, the page likely renders incorrectly.
- We recommend you remove third-party social media sharing widgets from your page. These links typically include JavaScript that the secure payment page removes for PCI DSS compliance.
- External style sheets including those you import in *Stylesheets* do not appear. Only styles from the default style sheet or inline on a part appear.
- To enhance performance between your site and Blackbaud's server, the program holds design and property

updates you make to the style sheet, layout, template, and page for your payment page in a queue. When this content remains static for five minutes, the updates push to the Blackbaud server within one hour. You cannot change this process. However, you can click **Update templates** in *Sites & settings* to manually update the changes for your secure payment page. For more information, see the *Administration Guide*.

Note: The program does not send updates to the Blackbaud secure payment server for Payment 2.0 pages that do not accept credit cards, Event Registration pages that do not accept credit cards, and Transaction Manager pages that do not allow payment type changes for recurring gifts.

- A generic template exists for the secure payment page. It is unlikely you want to use it because it does not match the rest of your website. However, Flash and JavaScript content does not upload to the secure payment page for PCI DSS compliance. If your page, template, or layout includes this content and the absence of it heavily impacts the appearance of your secure payment page, you may want to use the generic template. You can also use the generic template if you need to temporarily revert your template updates to the page. When you are ready to use your template again, you select **Enable secure payment template updates** and click **Update templates** in *Sites & settings*. For more information, see the *Administration Guide*.

Secure Payment Page: Transaction Processing Safeguards

When users navigate from the Payment 2.0 web page to the secure payment page and an interruption unexpectedly occurs before the transaction is submitted, your payment processor receives the payment and the information from the Payment 2.0 web page creates a transaction to process in Blackbaud CRM.

Tip: An interruption can occur when your website server refreshes while a user attempts to submit a transaction. An interruption can also occur when a user leaves your secure payment page for a time that exceeds the session login and then returns to the page and submits the transaction.

To support this functionality, a database process checks the CMS_SessionVariableBackup table for data every 24 hours. After Blackbaud Internet Solutions submits the data to Blackbaud CRM, it no longer exists in the table. The remaining data stays in the table for 30 days unless your system administrator changes the UnprocessedBBSPTransactionLifeSpanInDays web.config setting to increase or decrease the number of days. For example, to increase the number of days to 60, enter UnprocessedBBSPTransactionLifeSpanInDays = 60 in the appSettings node of web.config.

Note: The remaining data in the table likely exists because users entered payment information on the secure payment page, but did not submit the transactions. For PCI DSS compliance, the table does not include credit card information. Your system administrator can access the table to provide you with a list of these users so you can follow up with them.

Your system administrator can also use the ArchiveUnprocessedBBSPTransactions web.config setting to specify whether the process should move the remaining data from the table to the CMS_UnprocessedBBSPTransaction archive table in the database, or to delete it permanently. For example, to move the data to the archive table, enter ArchiveUnprocessedBBSPTransactions=True in the appSetting node of web.config. Otherwise enter False.

Payment Summary 2.0

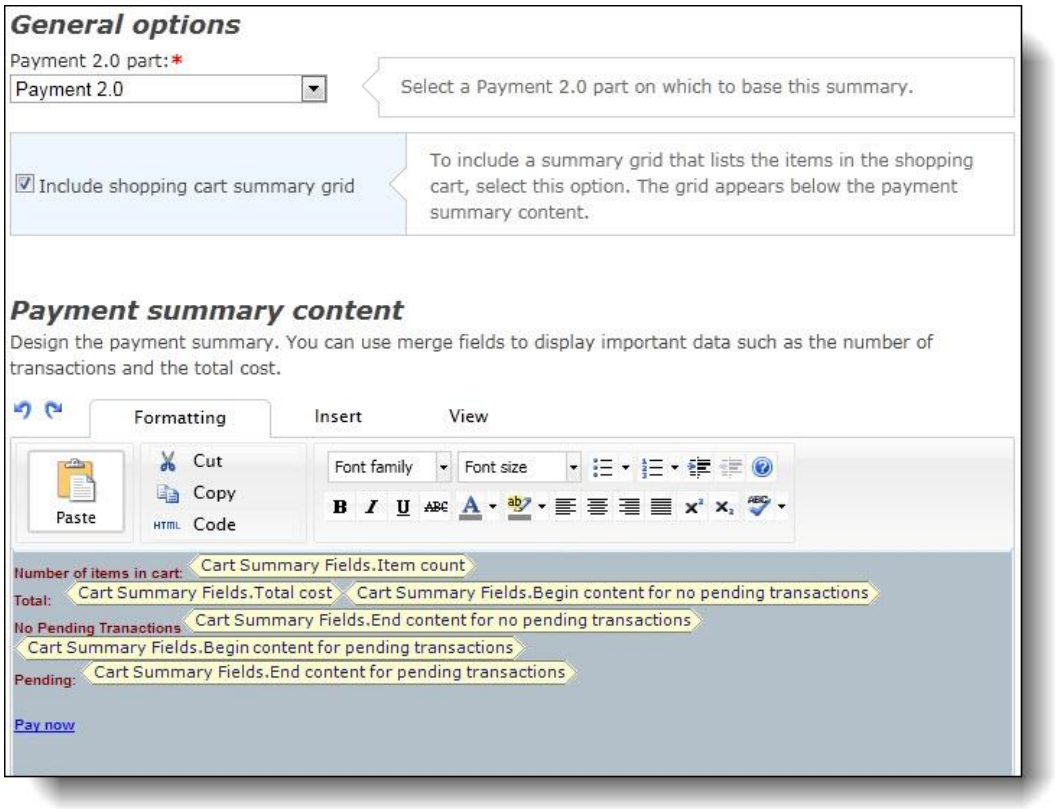
Payment Summary 2.0 part works with Payment 2.0 parts to provide website users a summary view of their payments. The payment summary can display the number of items on a payment page and the total cost for the items. It can also provide a link to view the payment page and pay for transactions. You can also include a summary grid that lists the items added to the cart and provides a brief description of each. When you add a link and place the summary on a page template, a website user can access the payment page from any web page that uses that template. You can also use merge fields to create two versions of the summary: one for an empty payment page and one for a page with transactions.

When you create a payment summary, you select a Payment 2.0 part to connect to the summary. For information about the Payment 2.0 part, see Payment 2.0 on page 107.

Design Payment Summary 2.0

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Payment 2.0 part** field, select the Payment 2.0 part to connect to the summary.



2. To include a summary grid that lists the items in the shopping cart, select **Include shopping cart summary grid**. The grid appears below the payment summary content.
3. Under **Payment summary content**, enter the text to appear in the payment summary. You can use merge fields to display the number of transactions on a website user's payment page and the total cost, as well as to provide a link to the page. You also can use merge fields to create conditional statements that appear according to whether the payment page contains transactions. To format the content's appearance and layout, use the HTML editor.

   For more information about the HTML editor, see the *Program Basics Guide*.
4. Click **Save**. You return to *Parts*.

Personal Notes

With the Personal Notes part, you can allow website users to share their stories with your organization. This part allows website users to communicate life changes, narratives, or other personal information through your website.

When you create the part, you designate a redirect page to appear after website users submit notes, and you select the note types from Blackbaud CRM that they can select when they submit personal notes.

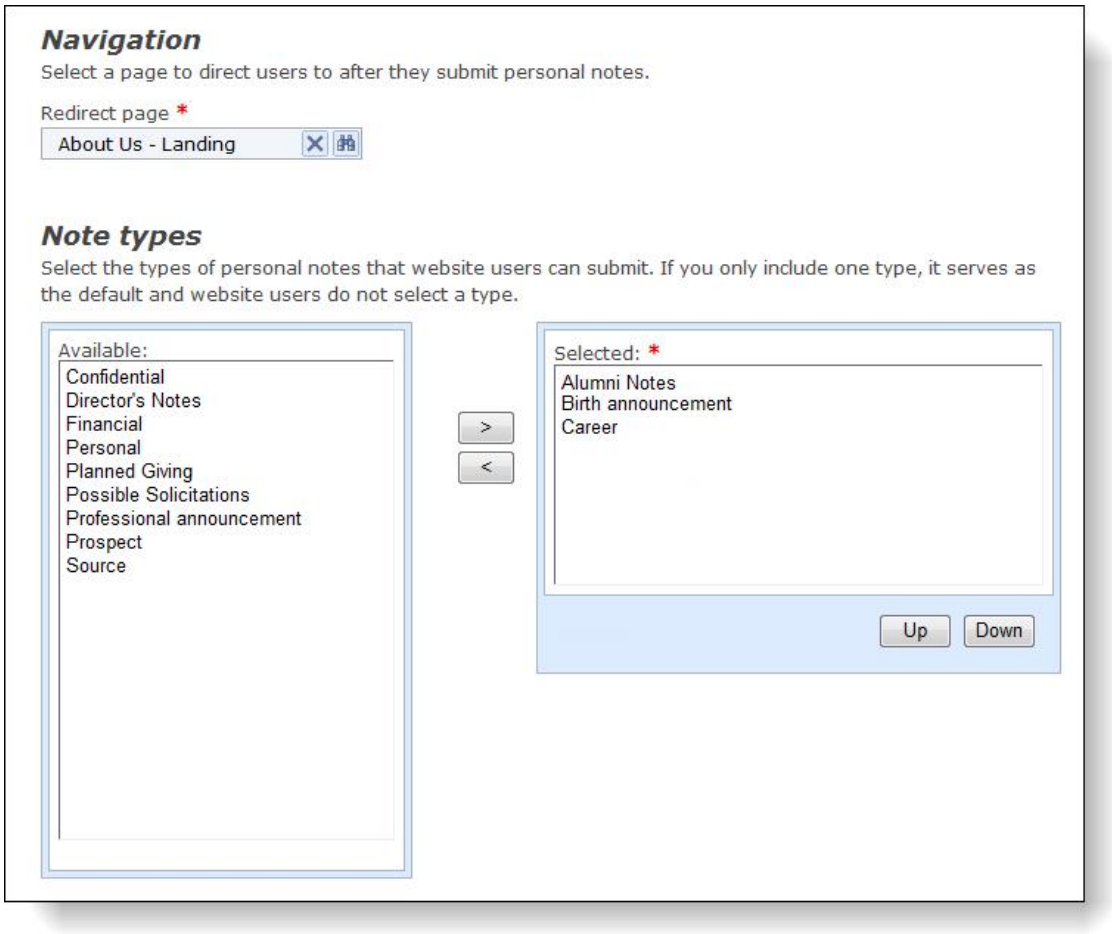
To submit personal notes, website users must log in to your Blackbaud Internet Solutions site. When users submit notes, the part saves the notes directly to their constituent records in Blackbaud CRM. These personal notes from your website appear on the Documentation tab along with any notes that you entered directly in in Blackbaud CRM.

In Blackbaud CRM, you can create constituent queries to monitor the personal notes that website users submit. The **Online Information** node under **Notes** includes **Page ID** and **Page name** fields that are associated with personal notes from your website. For information about how to create a query, see the Blackbaud CRM *Query and Export Guide*.

Design Personal Notes

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, select a redirect page in the **Redirect page** field. After website users submit personal notes, the part sends them to this page.



2. Under **Note types**, select the types of personal notes that users can submit. Under **Available**, all of your active note types from Blackbaud CRM appear. Use the arrow buttons to add or remove note types from the list that users select from on your website.

   Users select note types from a dropdown list on your website. If you only include one note type on the part, the field does not appear because that note type is selected by default.

   Tip: You can use the Language tab to edit the privacy statement that appears at the bottom of the Personal Notes part by default, as well as other labels on the part. For information about the Language tab, see Language Tab on page 10.

3. Click **Save**. You return to *Parts*.

Poll

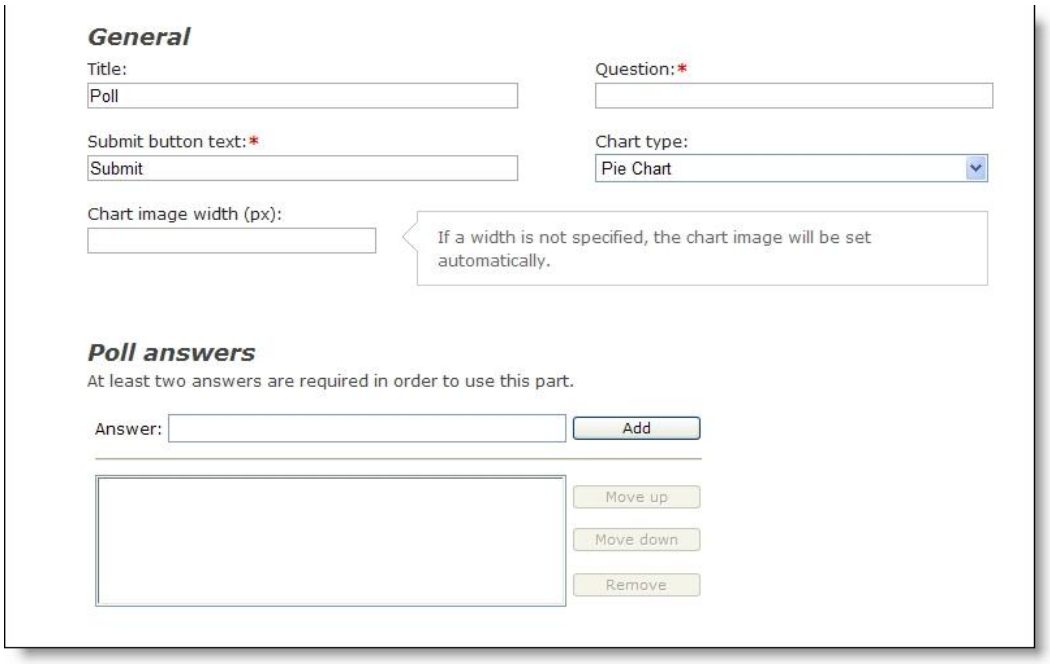
Use the Poll part to create a simple poll or survey. A poll may ask a trivia question or who users predict to win a race. After a website user submits an answer, the program calculates the poll results and displays them on the site.

With the Poll part, you can enter your poll or survey question, the text to display on the submit button, whether to use a pie chart or bar chart to display the results, and, if required, the possible answers for the poll or question. To prevent skewed polling results, these fields are disabled after a website user responds to a poll.

Design Polls

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Title** field, enter a title for the poll.



2. In the **Question** Field, enter the question for the poll.
3. In the **Submit button text** field, enter the text to appear on the button users click to submit their answer.
4. In the **Chart type** field, select “Pie Chart or “Bar Chart.”
5. Poll responses are limited to 255 characters. If you expect long poll answers, we recommend you enter a pixel (px) size in the **Chart image width** field. If you enter an image width less than a poll response, the response is truncated in the image. To correct this, adjust the pixel size in the **Chart image width** field.
6. Under **Poll answers**, for each answer for the poll response, enter the answer in the **Answer** field and click **Add**. The box displays the answers entered for the poll response.
7. Arrange the order of the answers as they should appear on your website.
   - To adjust the position of an answer in the order, select it and click **Move up** or **Move down**.
   - To remove an answer from the box, select it and click **Remove**.
8. Click **Save**. You return to *Parts*.

Profile Display

Use the Profile Display part to display a read-only profile page for website users to view profile details about an individual or organization. You select the fields to include in the profile display. For example, for an individual,

you can display biographical, address, and contact information about the user. You can also create separate Profile Display parts for individual constituents, organization constituents, and user networking groups.

Note: The Profile Display part displays profile information the user enters on a Profile Update Form. For information about how to create an editable profile form, see the *Forms Guide*.

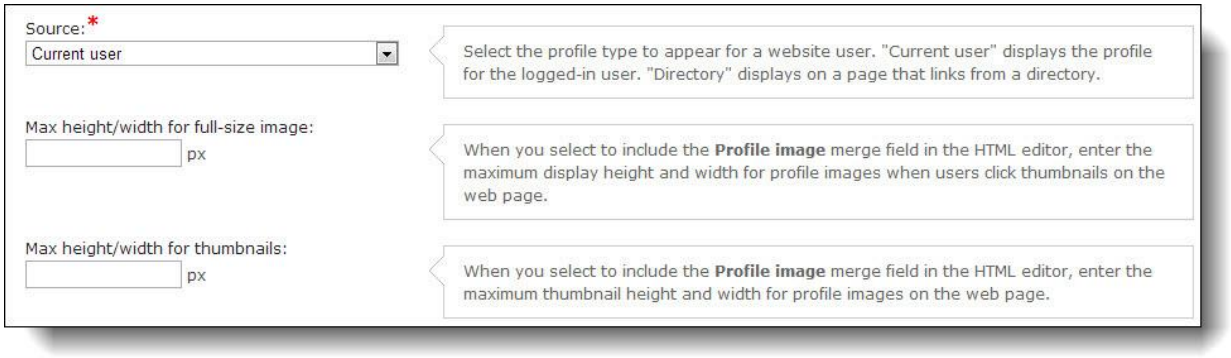
You can use the Profile Display part to display information for only the logged-in user or to link to a directory so it displays information for any person or organization selected in the directory. For more information about directories, see Directory on page 30.

Warning: You cannot use HTML to embed your own form via HTML in a Profile Display part. Consider putting the form on a page that is not stored in your database, but can be referenced in an iFrame tag. For more information about custom forms, send an email to solutions@blackbaud.com.

Design Profile Display

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

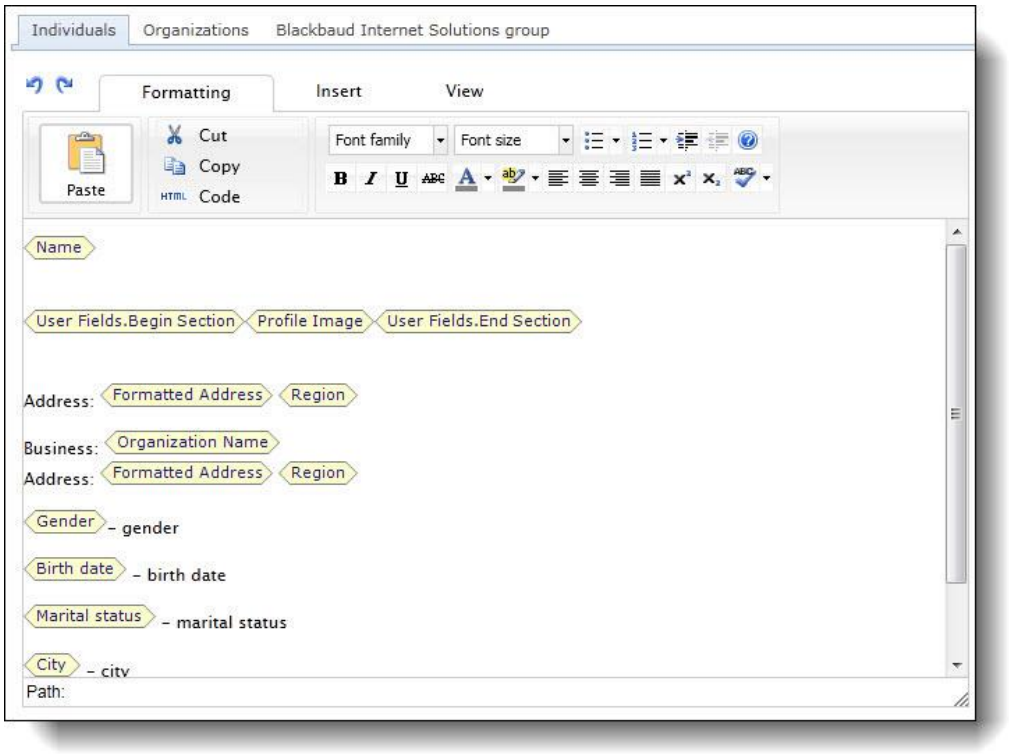
1. From the Design tab, in the **Source** field, select the profile type to appear when the website user clicks the link.



   - "Current User" — Select this to display the profile for the logged-in user.
   - "Directory" — Select this if this profile part is added to a page linked to a directory. When a profile is linked to a directory, users can click a field in the directory to display the profile for the selected person. For more information about directories, see Directory on page 30.
2. In the **Max height/width for full-size image** field, enter the maximum display height and width for full-size profile images that display when users click thumbnails on the web page.
3. In the **Max height/width for thumbnails** field, enter the maximum height and width for profile image thumbnails on the web page.

Tip: When you leave the **Max height/width for full-size image** and the **Max height/width for thumbnails** fields blank, the default size to display full-size and thumbnail profile images on a web page is 200 px. To include profile images on the part, make sure you include the **Profile image** merge field in the HTML editor design box.

4. On the HTML editor, select whether to create profile display content for an individual or organization constituent or for a user networking group.



- To design content to appear for an individual constituent, select the Individuals tab.
- To design content to appear for an organization constituent, select the Organizations tab.
- To design content to appear for a group on your user networking site, select the Blackbaud Internet Solutions group tab.

5. To enter and format the profile content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
   - When you design content to appear for an individual or organization constituent, you can add merge fields for personalized information to appear.
   - When you design content to appear for a user networking group, you can add merge fields for personalized information from the User Networking Manager part to appear.

Note: When a website user selects the **Make my primary email address private** checkbox on your Profile Update Form web page, it also designates their primary email address as private for this part on a web page. For more information, refer to Contact Information. When an email address does appear on the Profile Display page, the email address merge field renders it as a link for users to click to send a message to the address.

6. Click **Save**. You return to *Parts*.

Profile Form (Deprecated)

Note: The Profile Form part is now deprecated. While the deprecated part continues to operate for backwards compatibility on your website, you can no longer create or copy Profile Form (Deprecated) parts. Instead, you can use the Profile Update Form in *Forms*. It includes all the functionality of the Profile Form (Deprecated) part,

and its form designer supports greater flexibility for customization. For example, you can use the form designer to insert instructional text, add steps, or rename button labels.

With the Profile Form part, you can create profile forms for constituents and organizations to update their biographical, address, and contact information. For example, Jane Compton is a member of the Class of 1988. When she visits your website, she navigates to the user profile page and enters the information you selected to appear on the individual Profile Form part, such as her full name, current address, and spouse information. You can download the information she enters on your website to Blackbaud CRM.

You select the fields of information to appear in each section of the form. The user can select whether profile information is public (all users can view it) or private (only the user can view it). We recommend you use the profile form on password-protected pages only.

Note: When users update their profiles, the changes appear in profile displays or directory listings automatically, even before the changes are downloaded.

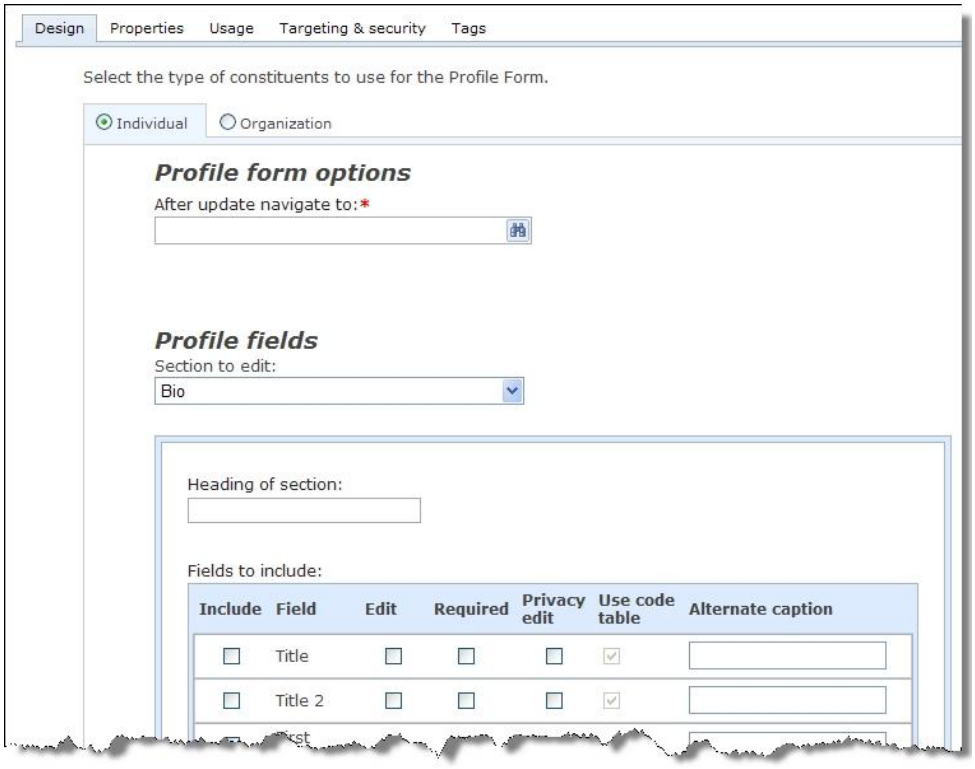
If a user is a relationship type with appropriate rights, he or she can edit profile information for an organization. For example, you can specify that only constituents with a relationship type of "Administrator" or "Primary Contact" can edit their organization's profile.

Note: To edit an organization's profile, in addition to the relationship type set on the Settings tab in *Sites & settings*, the website user must be established as a contact for the organization in Blackbaud CRM.

Design Profile Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Select the type of constituents to use the Profile Form**, select either **Individual** or **Organization**.



2. Under **Profile form options**, in the **After update navigate to** field, browse to the web page to appear after website users submit their profile information.

   If you do not select a page, the profile form appears after users submit profile information.

3. If you select **Organization**, the **Message to display when there are no organization records** box appears. In the box, enter the message to appear when website users who navigate to a page with the profile form part do not have an organization record or are not a relationship type with **Edit Org Profile** marked on the Settings tab in *Sites & settings*. For example, enter "There are no organizations associated with your record." For more information, see the *Administration Guide*.

4. Add each section to the profile form as required.

   a. In the **Section** field, select the type of section to add to the form. Fields appear in the grid for the section type you selected.

   b. In the **Heading** field, enter the text to appear at the top of the section. For example, for the Bio section of an individual profile, enter "Personal Information."

      To specify the order of sections, add a number to the beginning of each section heading. For example, if you select "Preferred Address" in the **Section** field and enter "2. Preferred Address" in the **Heading** field, the Preferred Address section appears second in the profile.

   c. In the **Fields** grid, select the fields to include in the section and options for the fields.

Note: To protect user passwords, users cannot change their user IDs, passwords, or email addresses on profile forms unless they confirm their passwords first. When users attempt to change the **Preferred Email** field in the Phones and Email section or the **User ID** and **Password** fields in the User Login section, a field requests their current password. Users must enter their passwords so that other users cannot change their credentials or receive email messages with their unencrypted passwords.

Option	Function
Include	Select the checkbox next to each field to include in the profile display grid.
Field	This column displays the fields from Blackbaud CRM you can include in the section.
Edit	To allow the user to edit a field, select this checkbox. If you do not select this checkbox, the field appears in the profile but the user cannot change its value.
Required	To make a field required, select this checkbox. If you select this checkbox, the user must select or enter a value for the field to complete the form.
Privacy edit	To allow users to hide the content of a field, select this checkbox. For example, to allow users to hide their birth dates on the profile display, select this checkbox for the **Birth date** field. On the profile display, "{private}" appears when users hide the field. For organizations, this column is disabled. ***Note:*** By default, the Profile Form part uses privacy settings from *Field Options* to determine whether to display content on the form display. After you process users and they visit the profile display, the program locks in these default privacy settings, and future changes in *Field Options* do not affect privacy settings for the users. However, users can still change the settings for the fields where you select **Privacy edit**.
Use code table	If a field has code table values, this checkbox appears. If you select this checkbox, the field on the form displays the code table values from Blackbaud CRM. If you do not select this checkbox, the user must enter a value in the field.
Alternate caption	To edit a field name, enter a new name in this column. For example, you can call the **Birth date** field the **Birth date (mm/dd/yyyy)** field.

5. Click **Save**. You return to *Parts*.

Query Results Display

The Query Results Display part displays output from Blackbaud CRM ad-hoc queries. For example, you can display a list of volunteer events that occur in the next 2 weeks. For some ad-hoc query types, you can also display different ad-hoc query information for different contexts. For example, you can display a context-sensitive list of events on profile pages to allow users to view the events they participated in on their own profile pages and the events that other users participated in on their profile pages.

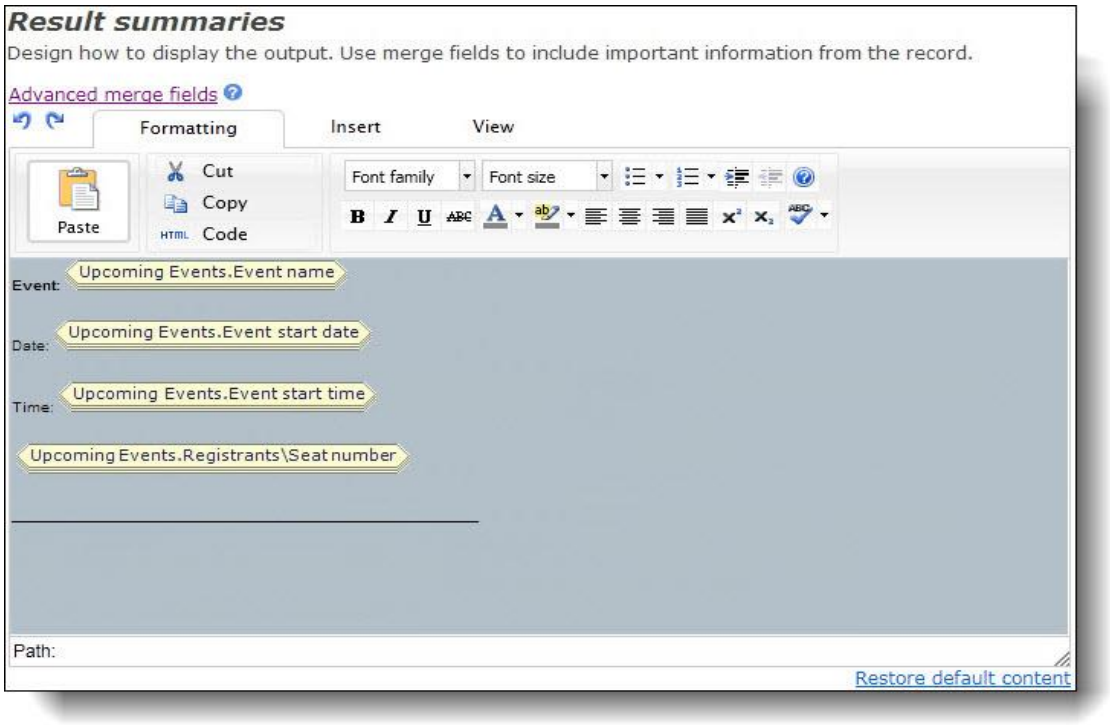
Design Query Results Display

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General options**, the **Query type** field, select the type of ad-hoc query to display.
2. In the **Query** field, select the ad-hoc query to display. The available ad-hoc queries are those saved in Blackbaud CRM.

Note: You can select any type of ad-hoc query to use with the Query Results Display part. For example you can select a Volunteer or an Events ad-hoc query. Smart queries from Blackbaud CRM are not available for use with this part.

3. In the **Maximum number of results** field, enter the maximum number of results to include in the display. If you limit the number of results, they display faster on the web page.
4. In the **Results per page** field, select the number of results to display on a page. Select **Show pagination** to include a **Next** button to allow users to click through the pages to view more results. If you do not select **Show pagination**, only one page of results appears.
5. If your ad-hoc query contains record output fields, a **Context filters** section appears. This section allows you to display different ad-hoc query information for different website users. For example, if an event registration ad-hoc query includes the **Registrants\Constituent\Constituent record** field, you can apply context filters to display registration information based on the user who accesses a page or based on the user associated with the page. To allow context sensitivity, select “Current registrant context” in the **Registrants\Registrants record** field and then select the context in the **Registrants\Constituent\Constituent record** field.
    - Select “Current user” to display a logged-in user's registration information. Use this option to display data that is relevant only to the logged-in user, such as events that the user registered for, the cost of tickets, and seating assignments. You can select this option for any type of page.
    - Select “Current constituent context” to display registration information for the user associated with a profile display page. Use this option to display public data. For example, you can display the events that a user participated in when other users visit that user's profile display page. Only select this option for profile display pages because context sensitivity doesn't work for other pages.
6. Under **Result summaries**, design the ad-hoc query results display. Use merge fields to define the ad-hoc query output to include. For certain types of ad-hoc queries, the text box includes merge fields by default. To add merge fields, click **Merge fields** on the Insert tab in the toolbar to open a screen where you can drag and drop fields into the text box. To select additional merge field groups, click **Advanced merge fields**.



To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

7. Click **Save**. You return to *Parts*.

Quick Search

To use the Quick Search part, you must have Microsoft *Full-Text Search* on your web server. If you do not, the part does not appear in *Parts*. This part can search other parts: Formatted Text and Images, Formatted Text and Images (Secured), Discussion Group, Event Calendar, Job Board, and Weblogs.

Note: You can select to install *Full-Text Search* when you install *SQL Server*. For general information about *Full-Text Search*, see your *SQL Server* documentation.

Learn About Quick Search

The Quick Search part is a text box with a search button that appears on the web page for site users to search for information. Due to its small size, it is useful to include on a web page template to add search functionality on pages throughout your site. The search text box has a limit of 255 characters.

Because the part does not have room to display search results, you must select a web page for the results to appear on. The web page must contain a Search part. This part is large enough to display search results similar to *Google*. The first line is a hyperlink to the web page. The next several lines provide a preview of the text that contains the word or phrase a user searched on. Words or phrases used in the search appear in bold.

Note: The primary difference between the Quick Search and Search parts is how results appear on your site. With the Quick Search part, you select a web page for results to appear on. With a Search part, results appear

automatically below the Search part. You can add a Quick Search part to a web page template; however, we recommend you not add Search parts to a template.

The parts available for a quick search are indexed by part. For example, a Formatted Text and Images part contains “boy.” On the same page, a Discussion Group part contains “scout.” If a user enters “boy scout” in the search field, results do not appear because the same part does not contain both words.

Warning: When the Quick Search part performs a search, it includes all pages on your website that contain a searchable part. Therefore, the potential exists for search results to return unfinished web pages. To prevent this, establish security to restrict the users who can view unfinished pages.

Note: When a user searches for a word or term on your website, search results include pages only. Searches do not include templates or the parts on templates.

The Quick Search part uses “stem” search. When a user enter a word in the search field, the search results include the word plus its plurals and verb tenses. For example, if a user searches for “run,” the search results return parts that contain the words “run,” “ran,” and “running.” The search also accepts certain operators and wildcards in the search text box. You can use the asterisk, quotation marks, and the minus sign in the Quick Search part.

Operator	Function
Asterisk (*)	Begins with (For example, enter “donat*” to return results such as donate, donating, donation.)
Quotation marks (“ ”)	Whole phrases (For example, “Become a Member Now” returns results that contain the entire phrase.)
Minus (-)	All words in search box minus preceding word or words (For example, “event registration -form” searches for “event” and “registration,” but excludes results that contain “form.”)

When a site visitor performs a search with the Quick Search part, security is upheld. For example, a web page contains the Formatted Text and Images part with the phrase “Board Member Personal Addresses.” Only users in the Board Member role with the applicable task rights can access this page. When other users search for “board member + addresses,” the page is not returned.

For information about security, see the *Users & Security Guide*.

Design Quick Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Results page** browse to the web page to display search results.
2. In the **Search button caption** field, enter the text to appear on your search button, such as “Go.”

   If you do not enter text for the button in the field, the button does not appear on your site. To process search results, site users press **ENTER** on the keyboard after they enter search information in the text field.
3. Click **Save**. You return to *Parts*.

Record Display

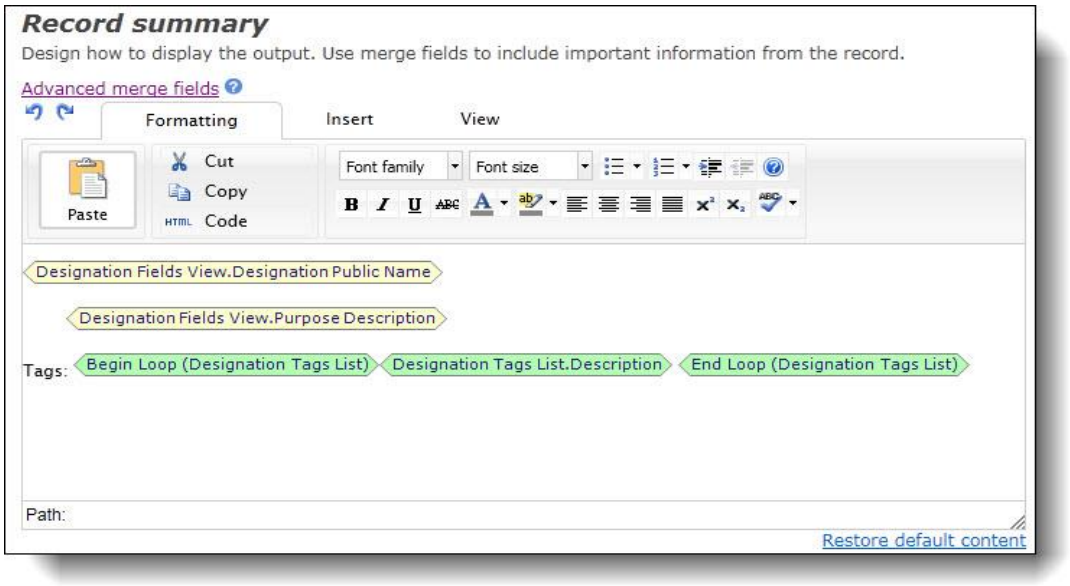
Use the Record Display part to provide a detailed description of a record. For example, the Record Search part displays a short description of each record included in the results. To provide a more detailed description of the

record, you can link from the search results to a page that contains a Record Display part.

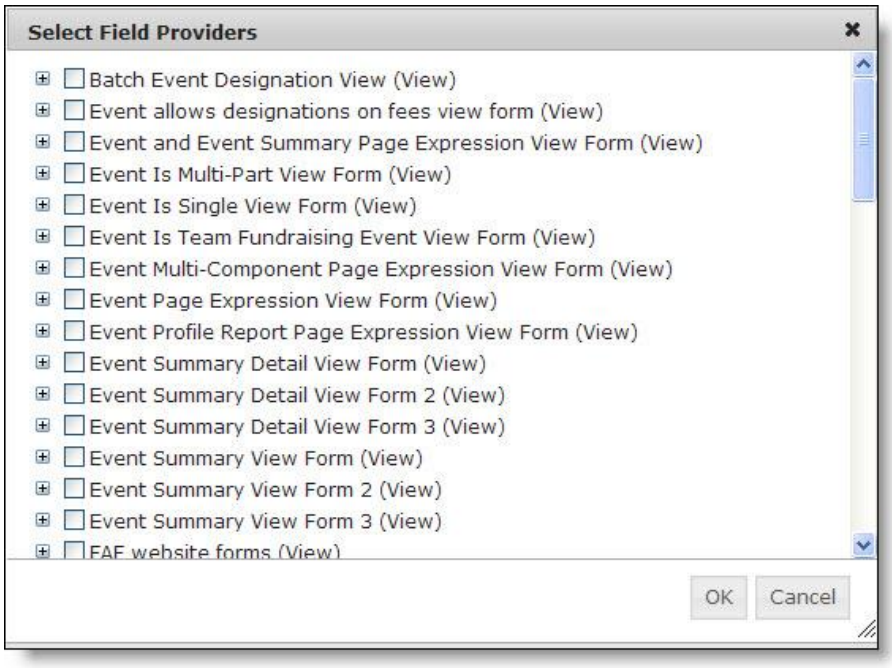
Design Record Display

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General options**, select the record type to display.
2. If you select "Constituent" for the record type, the **Current User** option appears. Select this option to display data that is relevant only to the logged-in user, such as events that the user registered for, the cost of tickets, and seating assignments. If you do not mark this option, the part displays information for the user associated with a profile display page. Leave this option unmarked when you need to display public data. For example, you can display the events that a user participated in when other users visit that user's profile display page. Select this option only for profile display pages because the context sensitivity does not work for other types of pages.
3. Under **Record summary**, design the search results display. Use merge fields to include information about records included in the results.



4. To select the merge fields to include, click **Advanced merge fields**. The Select Field Providers screen appears.



5. Select each group of merge fields to make available and click **OK**. You return to the Design tab.
6. Click **Merge fields** on the Insert tab in the toolbar to select the merge fields to include.

   To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
7. Click **Save**. You return to *Parts*.

Record Search

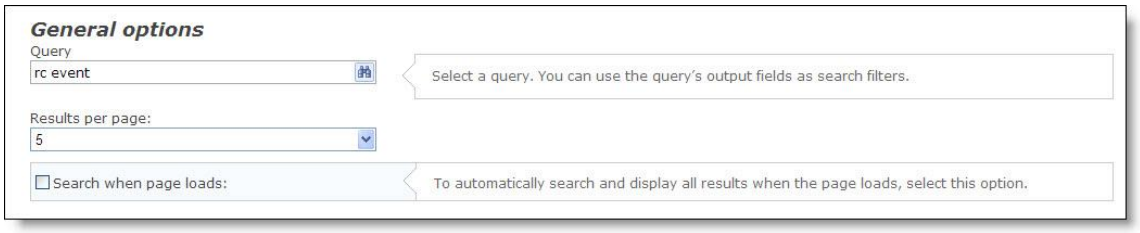
With the Record Search part, website users can enter key words or select search filters to search for records. You can choose the type of filters available for the search and you can design the content for the search results display. For example, you can create a search that allows users to search for events by event name, date, and location.

The search results include a short description of each record that meet the search terms. To provide a more detailed description, you can add a link from your Record Search part to a page that contains a Record Display part. For more information, see Record Display on page 127.

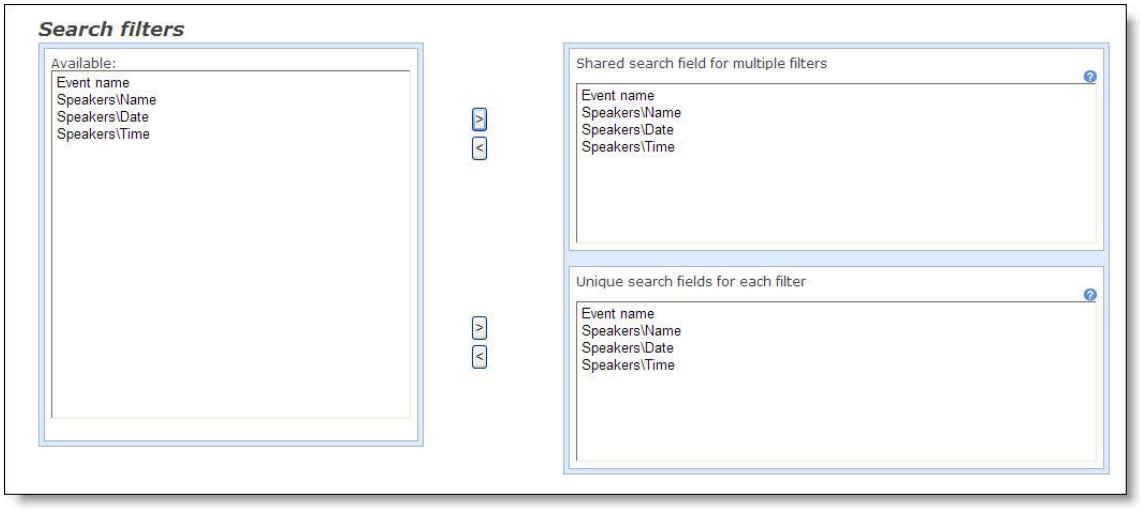
Design Record Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **General options**, select a query in the **Query** field. The output fields from the selected query are used as search filters on the record search form.

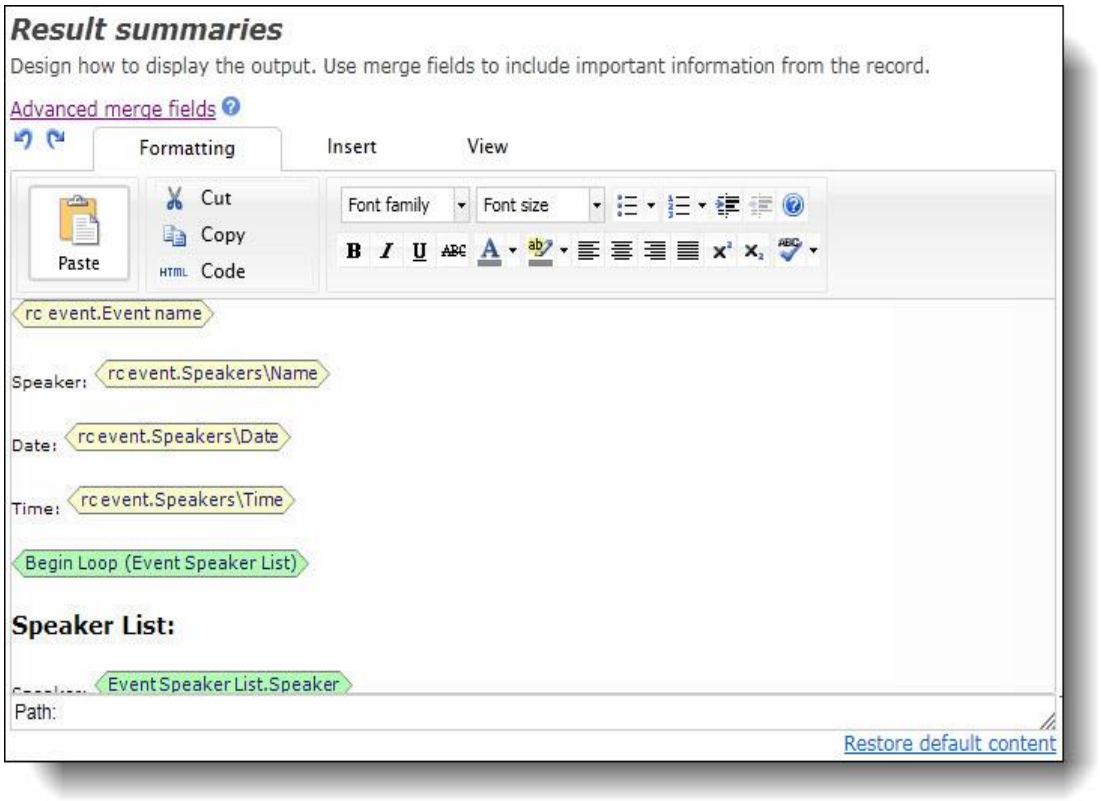


2. In the **Results per page** field, select the number of results to display on the page. If the search returns more results than the number entered, the results display on additional pages.
3. Select **Search when page loads** to automatically search and display all results when the page loads.
4. Under **Search filters**, move fields from the **Available** box to the boxes on the right.

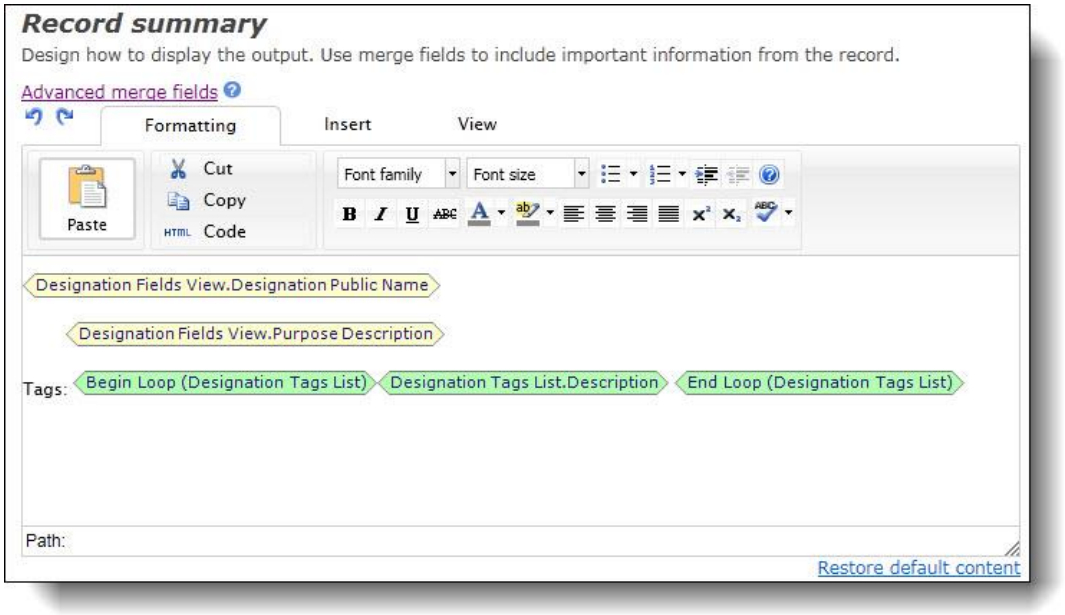


- **Shared search field for multiple filters** — This option creates a single keyword search field for multiple filters. For example, you include the public name and description as filter fields. Users can enter keywords in a search field and the program will return any public names or descriptions that match the keywords. For fields where users select from finite lists such as code table entries, it may be better to use the **Unique search fields for each filter** option.
- **Unique search fields for each filter** — This option creates multiple search fields to provide precise search results for each filter. This is most useful for fields where users select from finite lists such as code table entries. For example, if you include the record's purpose category and tags, users can select from the available categories and tags.

5. Under **Result summaries**, design the search results display. Use merge fields to include information about records included in the results.



6. To select the merge fields to include, click **Advanced merge fields**. The Select Field Providers screen appears.



7. Select each group of merge fields to make available and click **OK**. You return to the Design tab.
8. Click **Merge fields** on the Insert tab in the toolbar to select the merge fields to include.

9. To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.
10. Click **Save**. You return to *Parts*.

Search

To use a Search part, you must have Microsoft *Full-Text Search* on your web server. If you do not, the part does not appear in *Parts*. This part can search other parts: Formatted Text and Images, Formatted Text and Images (Secured), Discussion Group, Event Calendar Job Board, and Weblogs.

Note: You can select to install *Full-Text Search* when you install *SQL Server*. For general information about *Full-Text Search*, see your *SQL Server* documentation.

Learn About Search

When you add a Search part to your web page, a field name, text box, and search button appear on the page for site users to search for information on your website. Results appear below the Search part similar to *Google*. The first line is a hyperlink to the web page. The next several lines provide a preview of the text that contains the word or phrase a user searched on. Words or phrases used in the search appear in bold.

Note: The primary difference between the Quick Search and Search parts is how results appear on your site. With the Quick Search part, you select a web page for results to appear on. With the Search part, results appear automatically below your Search part. You can add a Quick Search part to a web page template; however, we recommend you not add a Search part to a template.

The parts available for a search are indexed by part. For example, a Formatted Text and Images part contains "boy." On the same page, a Discussion Group part contains "scout." If a user enters "boy scout" in the search field, results do not appear because the same part does not contain both the words.

Warning: When the Search part performs a search, it includes all pages on your website that contain a searchable part. Therefore, the potential exists for search results to return unfinished web pages. To prevent this, establish security to restrict the users who can view unfinished pages.

Note: When a user searches for a word or term on your website, search results include pages only. Searches do not include templates or the parts on templates.

The Search functionality uses "stem" search. When a user enters a word in the search field, the search results include the word plus its plurals and verb tenses. For example, if a user searches for "run," the search results return parts that contain the words "run," "ran," and "running." The search also accepts certain operators and wildcards in the search text box, such as asterisks, quotation marks, and minus signs.

Operator	Function
Asterisk (*)	Begins with (For example, enter "donat*" to return results such as "donate," "donating," "donation.")
Quotation marks (" ")	Whole phrases (For example, "Become a Member Now" returns results that contain the entire phrase.)
Minus (-)	All words in search box, minus preceding word or words (For example, "event registration -form" searches for "event" and "registration," but excludes results that contain "form.")

Warning: When you search for a phrase and do not use quotation marks, you may not receive any results. For example, "Become a Member Now" returns results, while Become a Member Now does not. This issue is due to a SQL Server setting that specifies how SQL handles searches that contain “noise” words. For more information, see this article: http://msdn.microsoft.com/en-us/library/ms187914.aspx.
To fix the issue, run this SQL:

```
sp_configure 'show advanced options', 1
RECONFIGURE
GO
sp_configure 'transform noise words', 1
RECONFIGURE
GO
```

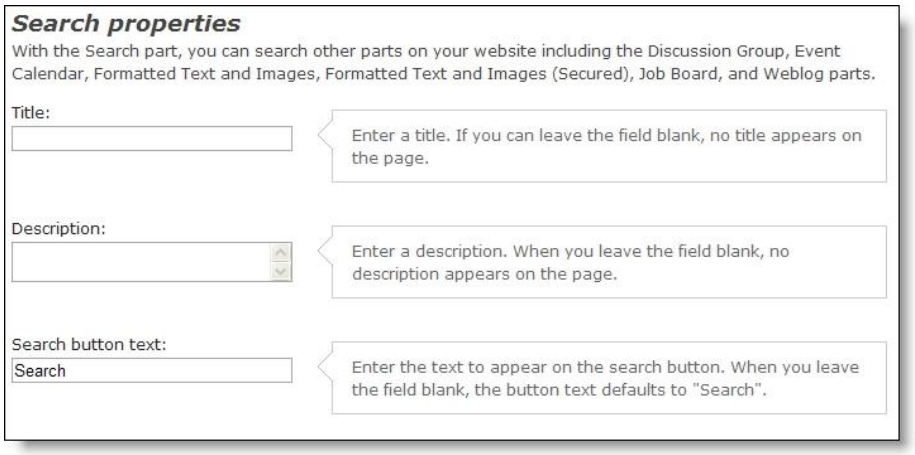
When a site visitor performs a search through the Search part, security is upheld. For example, a web page contains the Formatted Text and Images part with the phrase “Board Member Personal Addresses.” Only users in the Board Member role with the applicable task rights can access this page. When other users search for “board member + addresses,” the page is not returned.

For information about security, see the *Users & Security Guide*.

Design Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Search properties**, in the **Title** field, enter a name for your Search part. This title appears on your site.



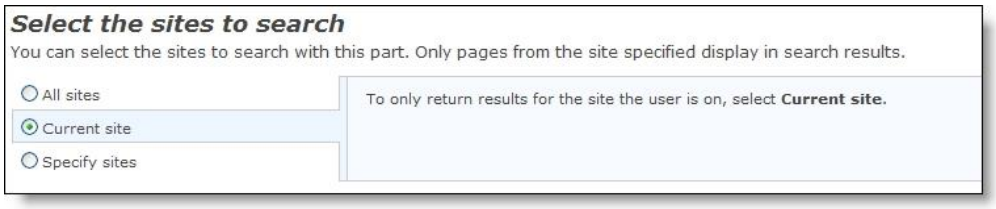
2. In the **Description** field, enter additional text to appear for users to read, such as “Search Job Postings.”
3. In the **Search button caption** field, enter the text to appear on your search button, such as “Go.”

   If you do not enter text for the button in the field, the button does not appear on your site. To process search results, site users press **ENTER** on the keyboard after they enter search information in the text field.
4. When you host multiple websites, **Select the sites to search** appears. Use these options to choose the sites to search with this part.

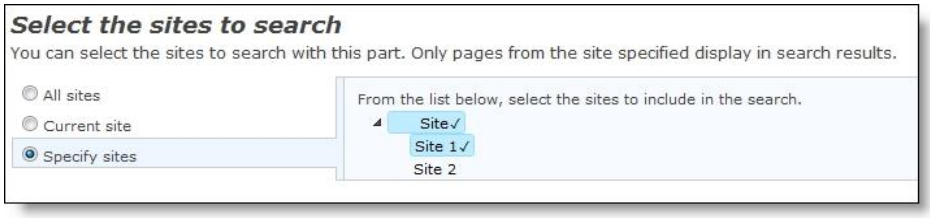
Tip: For more information about multiple websites, see the *Administration Guide*.

- To return results from all of your sites, select **All sites**.

- To only return results for the site the user is on, select **Current site**.



- To select sites to search, select **Specify sites**. A list of your sites appears for you to include the sites to search.



5. Click **Save**. You return to *Parts*.

Slideshow

To include a slideshow presentation of graphics on your website, you can create a Slideshow part. The slideshow can present graphics in a specified or random order. You can add navigation buttons so website users can start and stop the slideshow and move forward and backward between pictures. If the image has an assigned caption, it appears below the image and above the navigation buttons.

▶ Design Slideshow

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Slideshow options**, to display images in the slideshow in random order, select **Random display order**.
2. To include buttons below the slideshow, select **Show navigation buttons**. This table includes the navigation buttons available for the Slideshow part.

   This table includes the navigation buttons available for the Slideshow part.

Button	Function
	Play

Button	Function
	Pause
	Forward
	Back
	Stop

3. To display captions with the images in the slideshow, select **Show image caption**.
4. To enter the maximum dimensions for an image in your slideshow, select **Fixed width and height for all images** and enter the number of pixels in the **Number of pixels** field. This setting defines the height and width of the boundary that contains the image but does not directly alter the size of the images.

   An image's number of pixels cannot exceed the number you enter in this field. For example, if you have an image that is 200 pixels and set this boundary to 500 pixels, the image cannot increase to 500 pixels. Conversely, if you have an image that is 500 pixels and set the height/width size to 200, the image shrinks to fit that boundary.

Note: There is no limit to the number of photos you can include in a slideshow.

5. In the **Slide display interval (seconds)** field, enter the number of seconds to display an image before the next image in the slideshow appears. The default amount is five seconds.
6. Under **Add images**, click **Add image**. The Select Image From Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.
7. To change the order or remove images in the slideshow, click the up and down arrows or the red "x" buttons.
8. Click **Save**. You return to *Parts*.

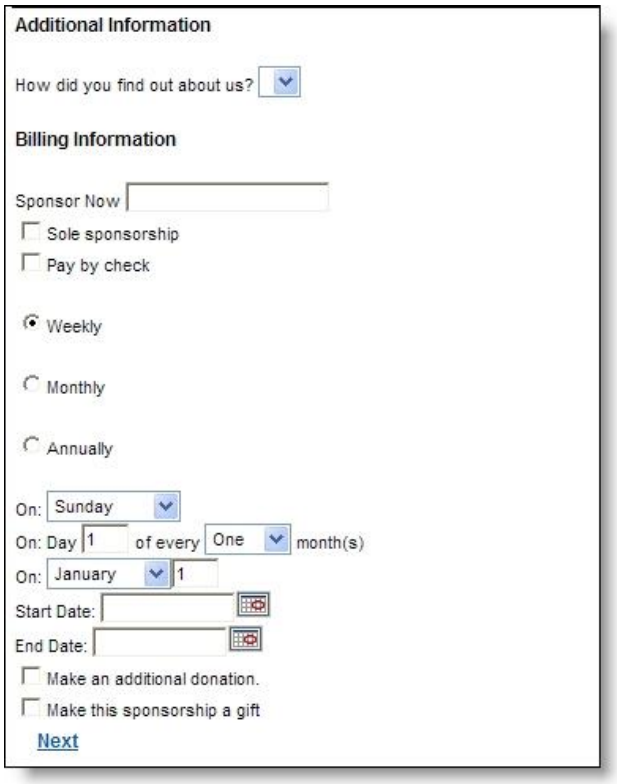
Sponsorship Form

Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

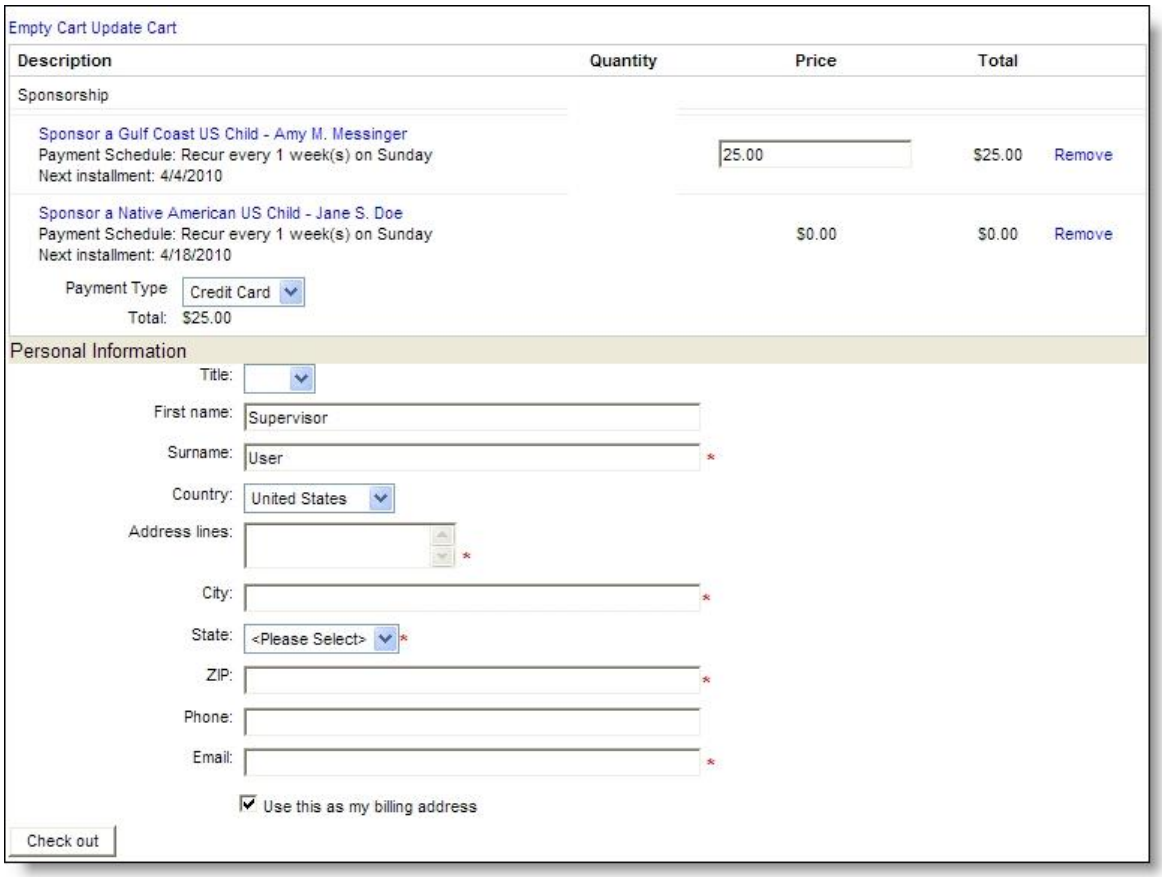
Use the Sponsorship Form part to design the form that appears on a web page when a sponsor selects an opportunity from the search results.

Note: The search results within greatest need groupings are random.

The form includes several features. You can use the HTML editor to design a section that contains additional information about the opportunity such as a picture or biographical information. You can also define the payment options available when website users purchase a sponsorship. For example, you can allow users to purchase sole sponsorships or sponsorships as gifts for others. You can also define the schedules available for sponsorship payments.



After sponsors complete the basic payment information, they click a link that takes them to a page that contains a shopping cart where they make the final payment transaction for the sponsorship. An email acknowledgement is sent to the sponsor when the payment transaction is complete.



When a user submits a sponsorship on your website, the data defaults directly on the constituent record. You do not need to process data in Blackbaud CRM for this part.

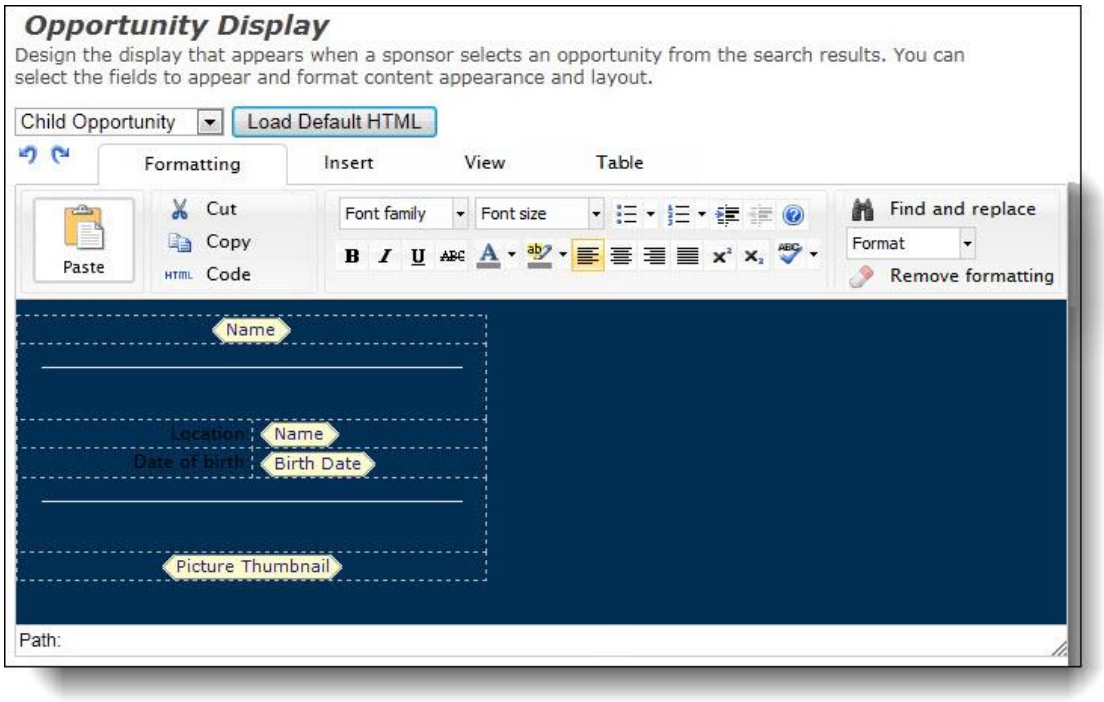
After users purchase a sponsorship, they can access a page that contains a Sponsorship Status part to view information about their current sponsorships. For more information about this part, see Sponsorship Status on page 150.

Sponsorship information integrates from Blackbaud CRM. For more information, see the Blackbaud CRM *Sponsorship Guide*.

Design Sponsorship Form

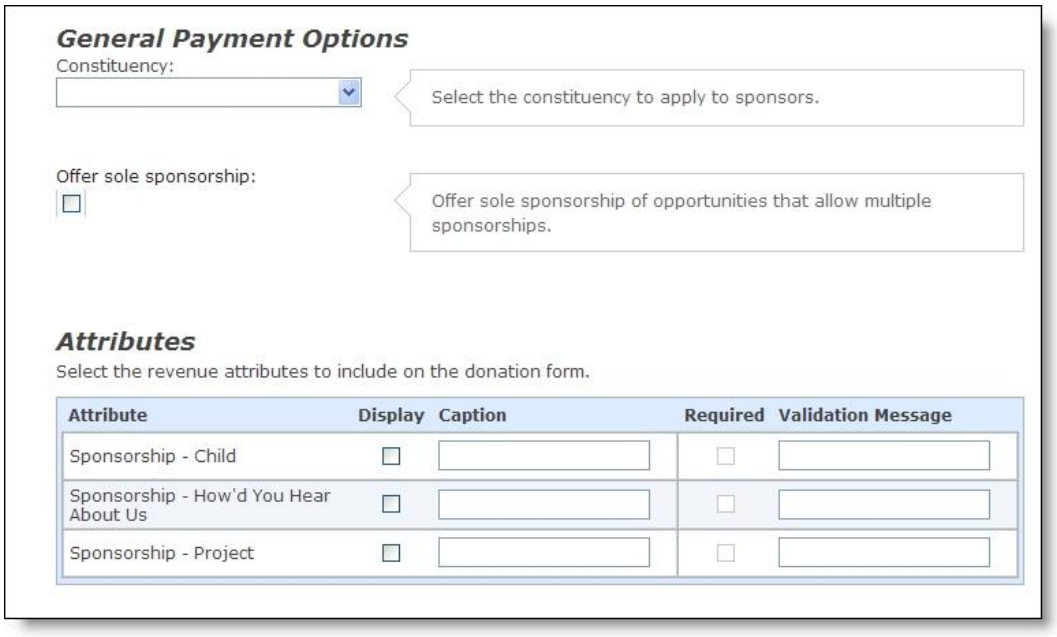
For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Opportunity Display**, select whether the display is for a child or project opportunity. In the HTML editor, design the display that appears when a sponsor selects an opportunity from the search results. You can select the fields to appear and format content appearance and layout. For information about the HTML editor, see the *Program Basics Guide*.



2. Under **General Payment Options**, in the **Constituency** field, select a constituency to assign to sponsors.

   For more information about constituencies, see the *Program Basics Guide*.



3. To offer sole sponsorship for opportunities with multiple sponsorships available, select **Offer sole sponsorship**. If a sponsor chooses to be the sole sponsor, he purchases all sponsorships for that opportunity.
4. Under **Attributes**, select revenue attributes to associate with the sponsorship page.
   a. Select **Display** for the attributes to include in the **Additional Information** section of the display.

b. In the **Caption** column, enter the text to appear for the attribute on the website. If you do not enter a caption, the attribute name appears on the website.

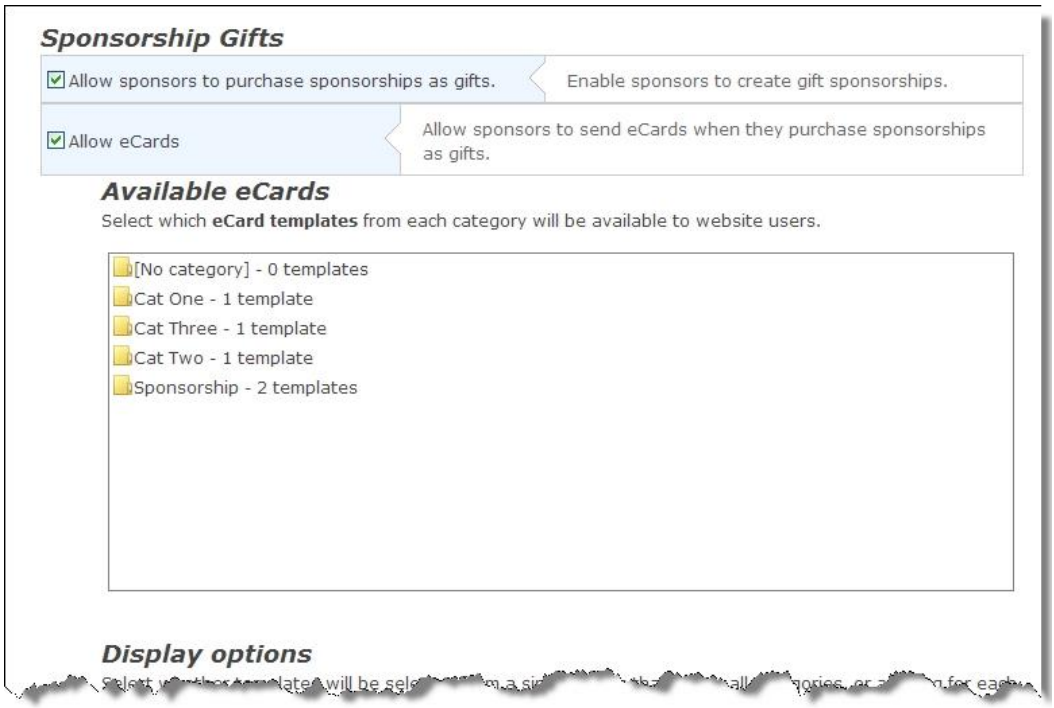
c. To make the attribute fields required, select **Required**.

d. In the **Validation Message** field, enter a message to display a message when the user fails to enter a value for a required attribute field.

Tip: The revenue attributes that appear in this frame are created in Blackbaud CRM. After you process a donation transaction, the attributes you select appear on the Attributes tab of a revenue record.

5. Under **Sponsorship Gifts**, select **Allow sponsors to purchase sponsorships as gifts** to add an option that allows sponsorship gifts.

6. If you select **Allow sponsors to purchase sponsorships as gifts**, the **Allow sponsors to send eCards when they purchase sponsorships as gifts** option appears. Select this option to allow sponsors to send eCards when they purchase sponsorships as gifts. Additional options for eCards appear.



a. Under **Available eCards**, select the eCard templates that sponsors can use.

b. Under **Display Options**, select how the selected eCard templates appear on the part's Choose screen on your website.

To display all the eCard templates together, select **Display the templates in a single listing**.

To display the eCard templates by category, select **Display the templates in separate listings by category**. When you select this option, your website users can browse for a template by its category.

c. Select whether the personal message field on the part's Personalize screen on your website generates plain text or rich text.

Note: All email applications can easily read the plain text format, but they do not allow users to adjust the text's color, font, or format. With rich text, users can adjust the text's format and embed pictures and links, but not

all email applications can easily read the rich text format. Applications that do not support the rich text format convert the text to the plain text format.

d. In the **Maximum height** and **Maximum width** fields, enter the maximum size, in pixels, of the thumbnail preview image of each template.

e. Under **Sender and Recipient options**, determine the maximum number of eCard recipients and whether to provide first and last name fields for senders and recipients.

f. In the **Maximum recipients** field, enter the maximum number of recipients for an eCard. You can allow website users to send eCards to a maximum of 100 recipients.

g. To provide one name field for the sender and one name field for recipients, select **Display all as single fields**. To display **First name** and **Last name** fields for both the sender and recipients, select **Display all as separate first and last name fields**.

7. Under **Additional Donations**, to include an additional contribution field on the sponsorship page, select **Allow sponsors to make additional donations**. Designation options appear.

a. The ability to credit the opportunity's designation with an additional donation defaults in the first row. In the **Display Name** field, enter text to appear for the option a user selects to apply the donation to the opportunity. For example, enter "Make a special cash gift to your child".

Tip: If you do not want a user to be able to make an additional donation for an opportunity, click **Remove** beside this row. The **Allow additional donation to opportunity** button enables for you to include this at a later time.

b. To include other designations to credit for additional donations, click **Add Designation**. A row appears with a binoculars icon for you to select a designation. Click the binoculars to search for a designation.

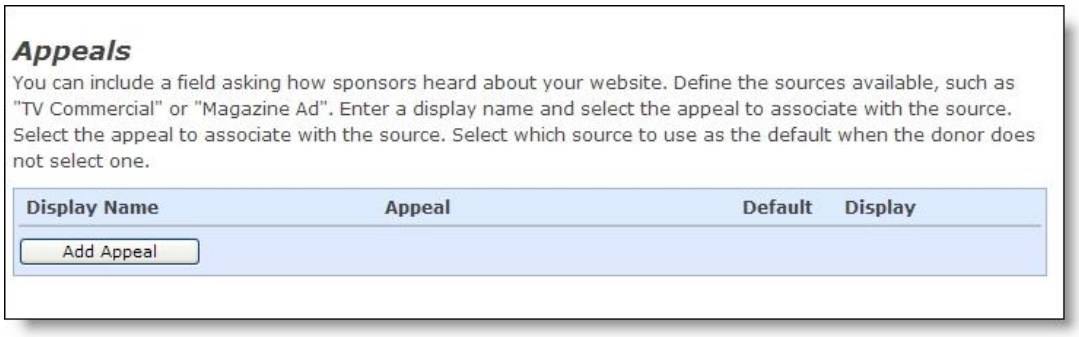
c. After you select a designation, in the **Display Name** field, enter the name of the designation as you want it to appear on the website.

d. If the sponsor does not select a designation, select the checkbox in the **Default** column for the designation additional gifts should apply to by default.

For each additional designation to make available on the page, click **Add Designation**. Another row appears in the grid for you to include another designation. When you add multiple designations, you provide a list of designations for sponsors to select from.

e. In the **Minimum donation amount** field, enter the minimum donation a sponsor can contribute. Enter "0" or leave this field blank for no minimum amount.

8. Use the options under **Appeals** to manage how sponsors learn about sponsorships through the website.



   a. To include an appeal, click **Add Appeal** in the **Appeal** column. The Appeal Search screen appears so you can select an appeal.

Tip: When you select source information, a **How did you hear about our site** field appears on the donation page. In this field, users can select from the appeals you select in this step.

   b. In the **Display Name** field, enter the name of the appeal as it will appear on the website. By default, the text entered in the **Appeal Name** field on the appeal record in Blackbaud CRM defaults in the **Display Name** field.

   c. In the **Default** column, select the checkbox for the appeal to use when the user does not select an appeal.

   d. To hide an appeal from the **How did you hear about our site** field, clear the checkbox for the appeal in the **Display** column.

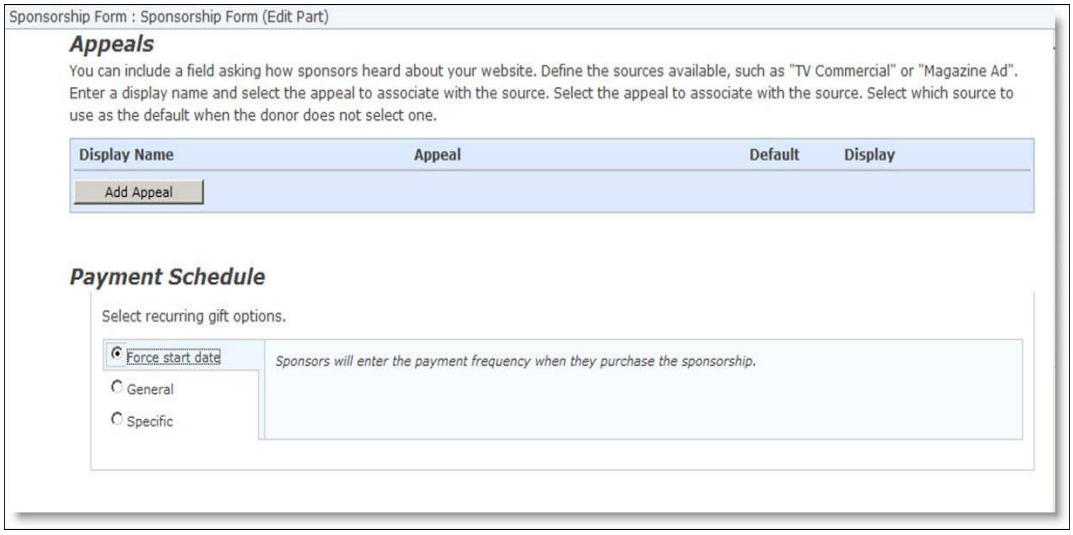
      When you do this, you can add source information to the end of a URL in an email that navigates the recipient to your donation page. For example, create a link to your donation page in an email message. At the end of the URL, add &source=camp. When the recipient clicks the link, the **How did you hear about our site** field does not appear on the page. The appeal stores automatically based on the source information in the URL.

      If the **Display** checkbox is selected for the appeal and a user navigates to the donation page via a URL without source information, the **How did you hear about our site** field appears on the page.

Note: The source information must include the appeal ID from Blackbaud CRM. For example, if the appeal ID in Blackbaud CRM is Annual2008, add &source=Annual2008 to the end of the URL. If the appeal ID includes a space, replace the space with a %20. For example, if the appeal ID is CAMP LETTER add &source=CAMP%20LETTER.

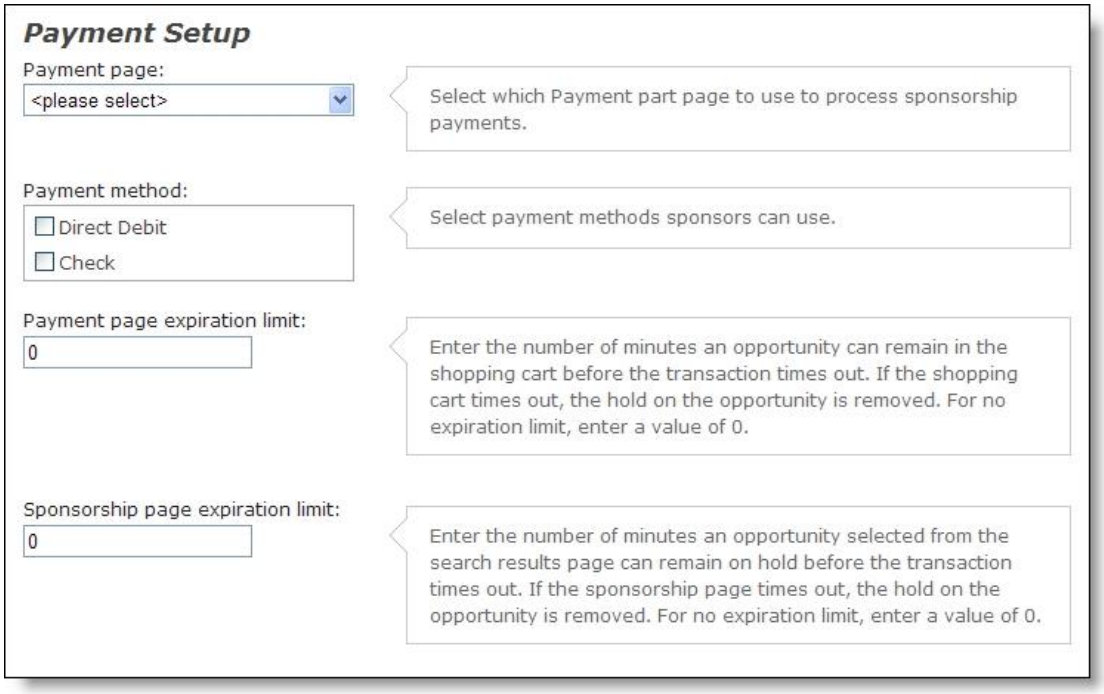
      To add additional appeals, click **Add Appeal**. Another row appears in the grid for you to select another appeal.

9. Under **Payment Schedule** select the payment options for recurring gifts.



- **Force start date** —If you select this option, you can select a frequency (weekly, monthly, quarterly, semi-annually, annually) to associate with the recurring gift.
- **General** — If you select this option, sponsors enter the payment frequency when they purchase the sponsorship.
- **Specific** — If you select this option, you can select the payment frequencies available to sponsors. Click **Add Frequency** to add the option to the form. Select **Allow sponsors to enter an ending date** to allow sponsors to enter an ending date for recurring payments.

10. Under **Payment Setup**, select the payment options for website users.



a. If your organization uses multiple general ledger account systems, the **Account system** field appears. In the field, select the GL account to post sponsorship payments to.

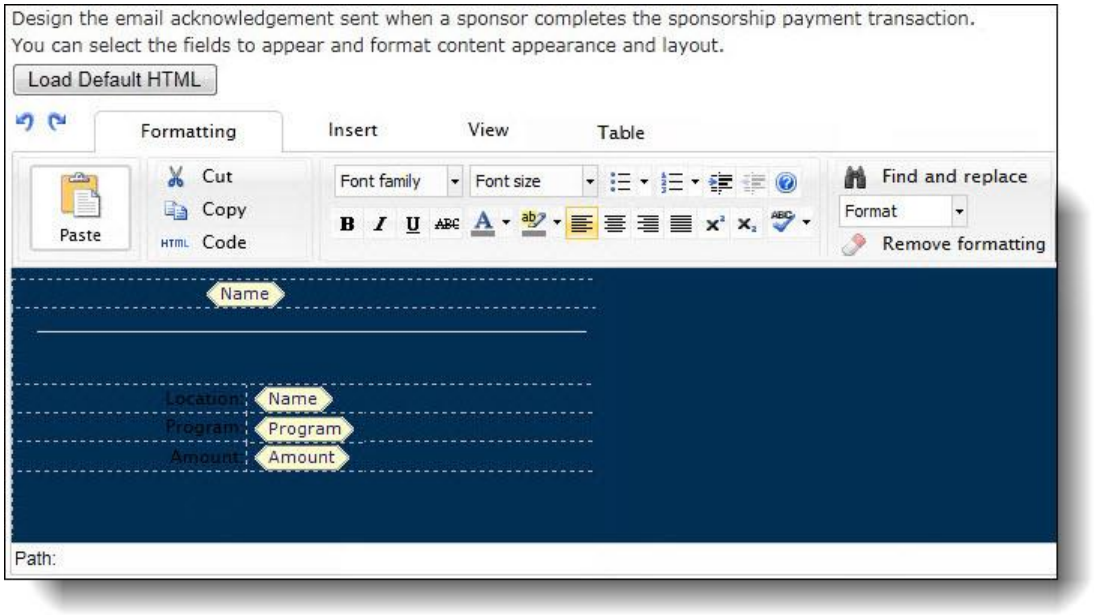
b. In the **Payment page** field, select the web page to use to process donations. The Payment 2.0 part on the selected page determines the payment methods and merchant account used to process donations. For information about the Payment 2.0 part, see Payment 2.0 on page 107.

c. In the **Payment method** box, select the payment methods available to sponsors. Credit card is included by default so it does not appear as an option.

d. In the **Payment page expiration limit** field, enter the number of minutes an opportunity can remain in the shopping cart before the transaction times out. If the shopping cart times out, the hold on the opportunity is removed. For no expiration limit, enter a value of 0.

e. In the **Sponsorship page expiration limit** field, enter the number of minutes an opportunity selected from the search results page can remain on hold before the transaction times out. If the sponsorship page times out, the hold on the opportunity is removed. For no expiration limit, enter a value of 0.

11. Click **Next**. On the screen that appears, design the email acknowledgement sent when a sponsor completes the sponsorship payment transaction. You can select the fields to appear and format content appearance and layout.



For information about how to design an email to acknowledge an sponsorship payment, see the *Email Guide*.

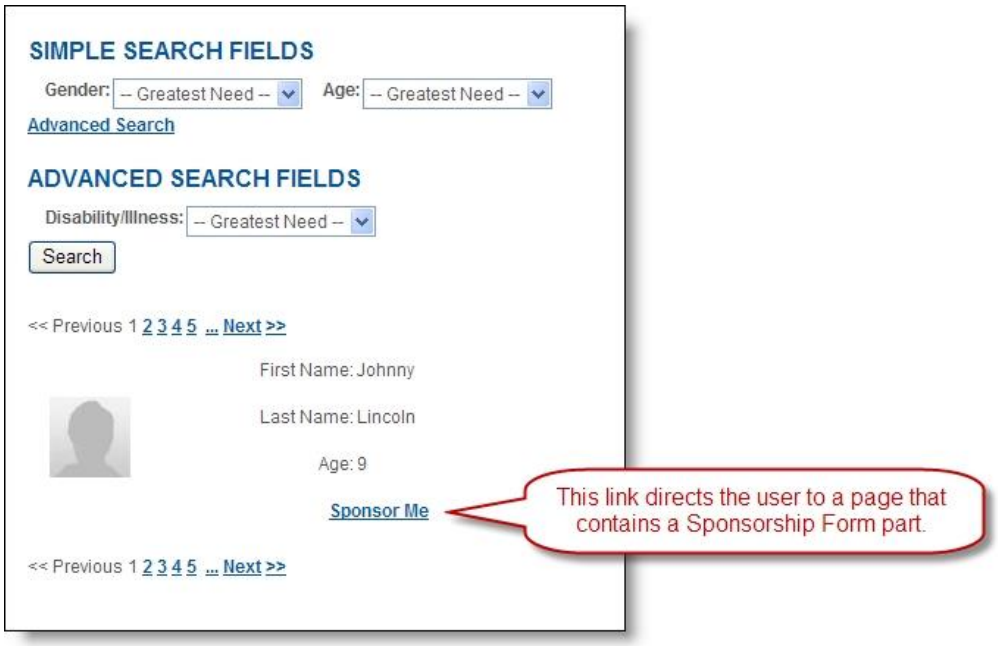
12. Click **Save**. You return to *Parts.*

Sponsorship Search

Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

Use the Sponsorship Search part to create a search section on your website for users to find available opportunities to sponsor. You can provide two levels of search — a simple search and an advanced search. For

example, you can provide the advanced search so users have the option to refine their search criteria for more precise results. The sponsorship data that appears in search results integrates from *Sponsorship* in Blackbaud CRM. Users select a child or project to sponsor from the search results.



When you add the part to a web page, the search criteria appears at the top of the page and search results appear at the bottom of the page. After users find an opportunity to sponsor, they click a link to a page that contains a Sponsorship Form part. The sponsorship page includes information about the opportunity, as well as payment options for the sponsorship. For more information about the Sponsorship Form part, see Sponsorship Form on page 135

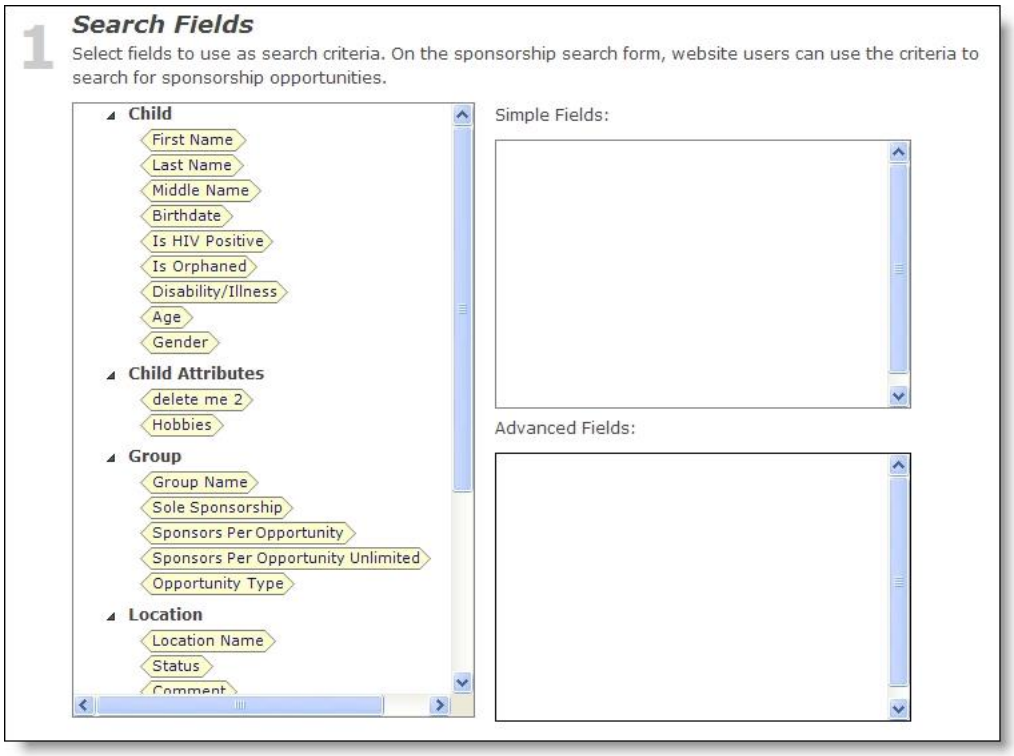
Note: When you design the Sponsorship Search part, several options can heavily impact the performance of the search web page. To provide the best experience for website users, refer to Sponsorship Search: Performance Improvement Tips on page 148.

Design Sponsorship Search

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

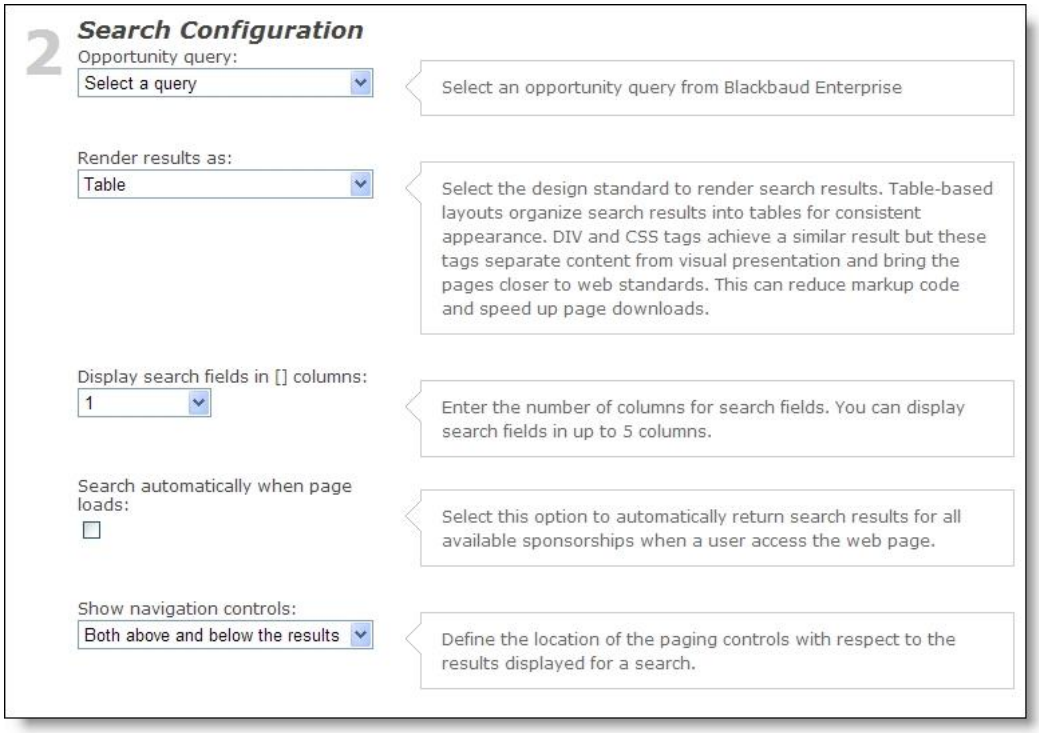
1. From the Design tab, under **Search Fields**, drag and drop fields into the **Simple Fields** or **Advanced Fields** box. Website users enter criteria in the fields to filter search results. You can provide two levels of search — a simple search and an advanced search. For example, you can provide the advanced search so users have the option to refine their search criteria for more precise results. To change the order of fields, drag the field to its new position.

Tip: To customize the text to appear on the web page for information such as the simple search and advanced search fields, select the Language tab.



Note: The available search fields and attributes default from the Sponsorship Opportunity - CMS in Blackbaud CRM.

2. Under **Search Configuration**, select search criteria information for the part.



a. In the **Opportunity query** field, select the query of opportunities to include in the search results. The available Sponsorship Opportunity - CMS queries integrate from Blackbaud CRM. If you do not select any search fields in the **Available Fields List**, the search results include all records in the selected query.

b. In the **Render results as** field, select "Table" to display search criteria in a default table. Select "DIV" to display search criteria in a table you customize with style sheets.

   For more information, see the Website Design Guide.

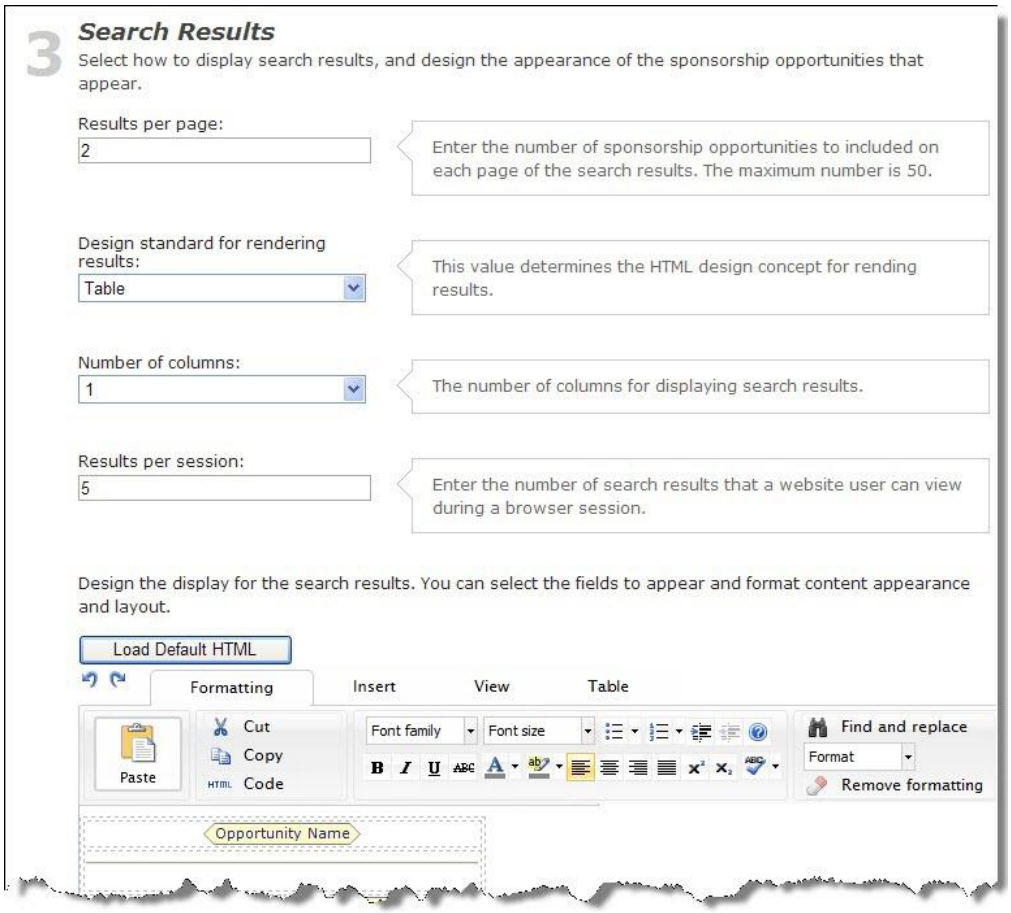
c. In the **Display search fields in [] columns** field, enter the number of columns to use to display search criteria fields.

   Both table options in the **Render results as** field contain the search criteria columns. When you select "Table," the table automatically resizes when you change the number of columns. When you select "DIV" and change the number of columns, you must update your style sheet data according to the number of columns.

d. To return search results for all available sponsorships when a user accesses the web page, select **Search automatically when page loads**.

e. In the **Show navigation controls** field, select whether the navigation buttons should appear above the results, below the results, or both above and below the results.

3. Under **Search Results**, specify how search results appear on the web page.



a. In the **Results per page** field, enter the maximum number of results to appear on a page. You can display up to 50 results per page.

b. In the **Design standard for rendering results** field, select "Table" to display results in a default table. Select "DIV" to display results in a table you customize with style sheets.

   For more information, see the *Website Design Guide*.

c. In the **Number of columns** field, enter the number of columns to use to display results.

   Both table options in the Design standard for rendering results field contain the results columns. When you select "Table," the table automatically re-sizes when you change the number of columns. When you select "DIV" and change the number of columns, you must update your style sheet data according to the number of columns.

d. In the **Results per session** field, enter the number of results a user can view during a browser session.

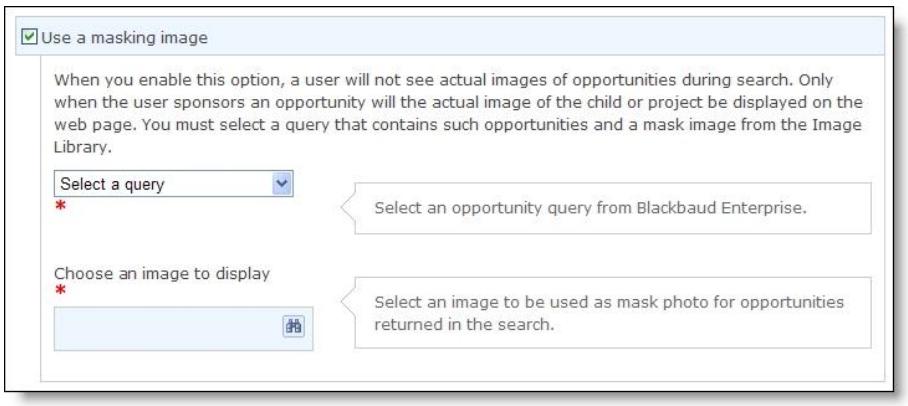
Note: The number in the **Results per page** field should be less than the number in the **Results per session** field. If the number is greater, you display more results on a page than a user can view.

4. Under the **Load Default HTML** button, enter the text to appear on the search results. To customize fields on the page and format the content's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

   To use the program's default search results display, select **Load default HTML**.

Note: You can include the <**Sponsorship Link Begin**> and <**Sponsorship Link End**> merge fields in your search results to link the user to the sponsorship form page. These merge fields do not appear in the final results, but they create a link for the content in between the merge fields. For example, you can enter "<**Sponsorship Link Begin**>Sponsor this child<**Sponsorship Link End**>." On the web page, this displays "Sponsor this child" as hyperlink to the page that contains the sponsorship form part. Users click the link for more information about the sponsorship.

5. To provide security for unsponsored opportunities, such as children, select Use a masking image to include a generic photo for the opportunity until checkout is complete. Additional fields appear.



a. In the query field, select the query of opportunities to apply the image to.

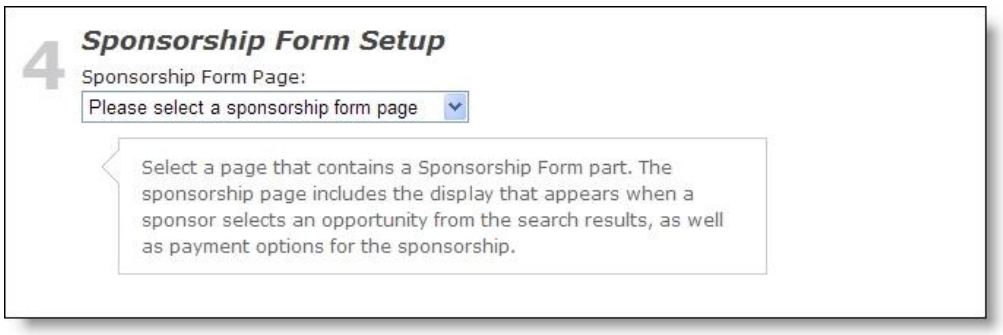
   If you cannot find the query but know it is exists, make sure the query type is Sponsorship Opportunity - CMS.

   The image you select appears only for opportunities that exist in this query and in the query you select in the **Opportunity query** field. In addition, when an opportunity exists in this query but not

in the previous query, it does not appear in search results. For example, in the **Opportunity query** field, you select the "All opportunities" query. In this query field, you select "All US children." The masked image appears only for the US children in both queries in your search results. Other opportunities in the "All opportunities" query display the default photo for the opportunity. Other opportunities in the "All US children" query do not appear in search results.

b. In the **Choose an image to display** field, click the binoculars to select a masking image for the opportunities. The Select Image from Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.

6. Under **Sponsorship Form Setup**, select a page that contains a sponsorship form part. The sponsorship page includes the display that appears when a sponsor selects an opportunity from the search results, as well as payment options for the sponsorship. When users click the link created with the **Sponsorship Link Begin**/**End** merge fields, they are directed to this page automatically. For more information about the Sponsorship Form part, see Sponsorship Form on page 135.



7. Click **Save**. You return to *Parts.*

Sponsorship Search: Performance Improvement Tips

When you design the Sponsorship Search part, the query you select from Blackbaud CRM and the number of search results you display on the web page can heavily impact the performance of the page. To provide the best experience for website users, review these importance performance tips.

- When you design the part and include the **Location Name** field under **Search Fields**, make sure the **Show this location to online users** checkbox is selected for each location you want to make available on your web page. This checkbox appears on the Add or Edit a sponsorship location screen in Blackbaud CRM. For information about sponsorship offline data entry, refer to the Blackbaud CRM*Sponsorship Guide*.

- You associate a Sponsorship Opportunity – CMS query from Blackbaud CRM with the Sponsorship Search part. This query is used when a search occurs on the web page to return results by:

1. First, identifying opportunities that are valid to sponsor at the time of the search.
2. Second, returning data that matches the search filters the website user selected.

   By default, the query only returns opportunities that meet the program's standard criteria. However, your organization can include more fields to the query to add additional fields to search to further limit opportunity results.

- Whether or not you select the **Show this location to online users** checkbox for an opportunity's location in Blackbaud CRM impacts the web page search in two ways.

1. Location filter - When you design the part to include the **Location Name** field under **Search Fields**, only locations with the checkbox selected appear in the search field. However, the locations that appear depend on whether or not your Sponsorship Opportunity – CMS query has an associated selection.
    - If the query is not associated with a selection, *all* locations appear from the search field. Be aware this can include locations that do not have a corresponding opportunity when a website user executes a search.
    - When query has an associated selection, only locations that correspond to opportunities in the selection appears from the search field. When you use a selection, the search limits the location options to only those that will return a search result.
2. Search results - When you design the part to include the **Location Name** field under **Search Results**:
    - When the opportunity's location has the checkbox selected, that location displays.
    - Otherwise, the program moves up the location hierarchy from the opportunity's location until one with the checkbox selected is found. When this occurs, that location displays.

    For example, if the Blackbaud CRM location hierarchy includes the following:

    Africa – **Show this location to online users** checkbox selected

    - Ethiopia – checkbox *not* selected
    - Malawi – checkbox *not* selected

    North America – **Show this location to online users** checkbox selected

    - Haiti – checkbox *not* selected

    When opportunities exist in all three countries, but only opportunities in Malawi appear in the query results, the following appears on the page based on whether or not you use a selection from the query.

    Note: When an opportunity is marked inactive in Blackbaud CRM, it does not appear in search results on the web page.

    - When you use a selection, only Africa appears.
    - When you do not use a selection, Africa and North America appear on the page. If a website user searches for North America, results do not appear on the page.

- To improve performance and decrease search time on the web page, always use a *static* selection from your query for this part. When you use a static selection, the query process to filter locations (and other criteria you select) occurs at the time you create the selection and it only processes again when you refresh the query in a queue. A static selection is a saved list referenced by web page requests. When you use a dynamic query, the query filters criteria process at least once for every website user's web session and this happens directly on the web page. This can degrade performance and the website user's experience.

  Tip: To create a static selection from a query, open the query in Blackbaud CRM and select the Set save options tab. Next, select **Create a selection**, **Create a static selection**. For information about queries, refer to the Blackbaud CRM *Query and Export Guide*.

- We recommend you then schedule the query to update using a queue process in Blackbaud CRM. When

you do this, it is important to refresh the static selection on a regularly interval that benefits your organization's opportunity needs the most. For example, if you constantly add new opportunities to the Blackbaud CRM database, you may want to run the queue daily. If you add new opportunities once a month, you may want to schedule the queue to run monthly.

Schedule the queue to run after hours to avoid refreshing the query during peak usage by website users. For information about queue, refer to the Blackbaud CRM *Queue and Business Process Guide*.

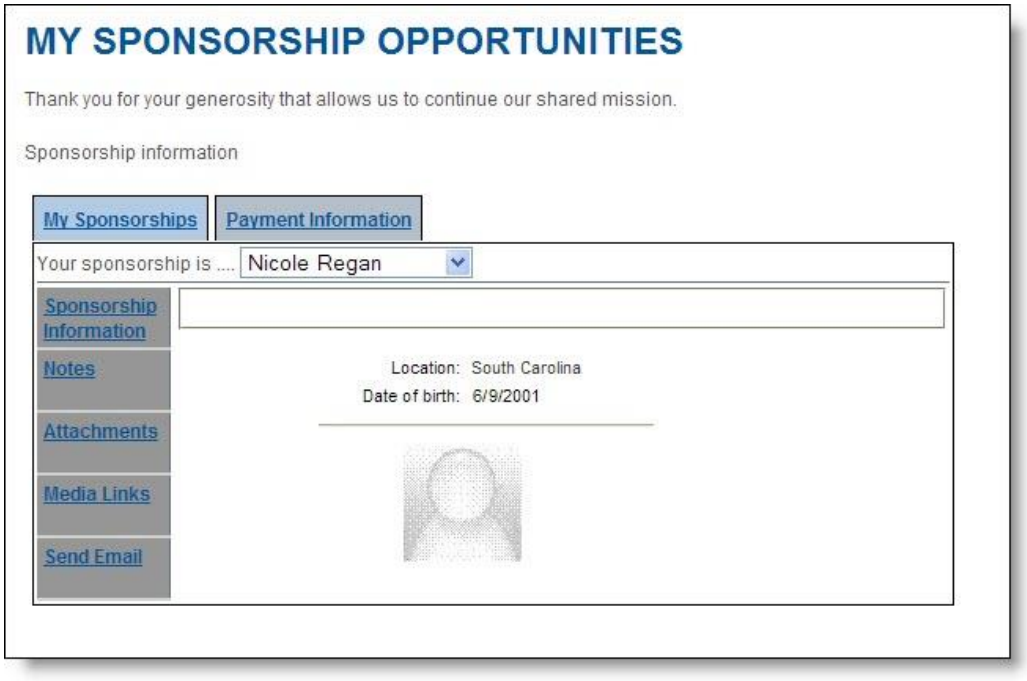
- When you design the part, the **Results per page** field includes the number of opportunities a website user can view on each page of the results. For example, if you enter "25" in this field and a user's search returns 100 results, four pages return with 25 result opportunities on each page. The **Results per session** field includes the number of results a user can view during a browser session.Therefore, the number in the **Results per page** field should be less than the number in the **Results per session** field. If the number is greater, you display more results on a page than a user can view.

  The higher the number you enter in these fields increases the volume of data the program must handle to return results on the page. To provide an optimal experience for website users, you can change these numbers to determine if the impact on the page is acceptable. If not, decrease the numbers to decrease the time it takes to return results.

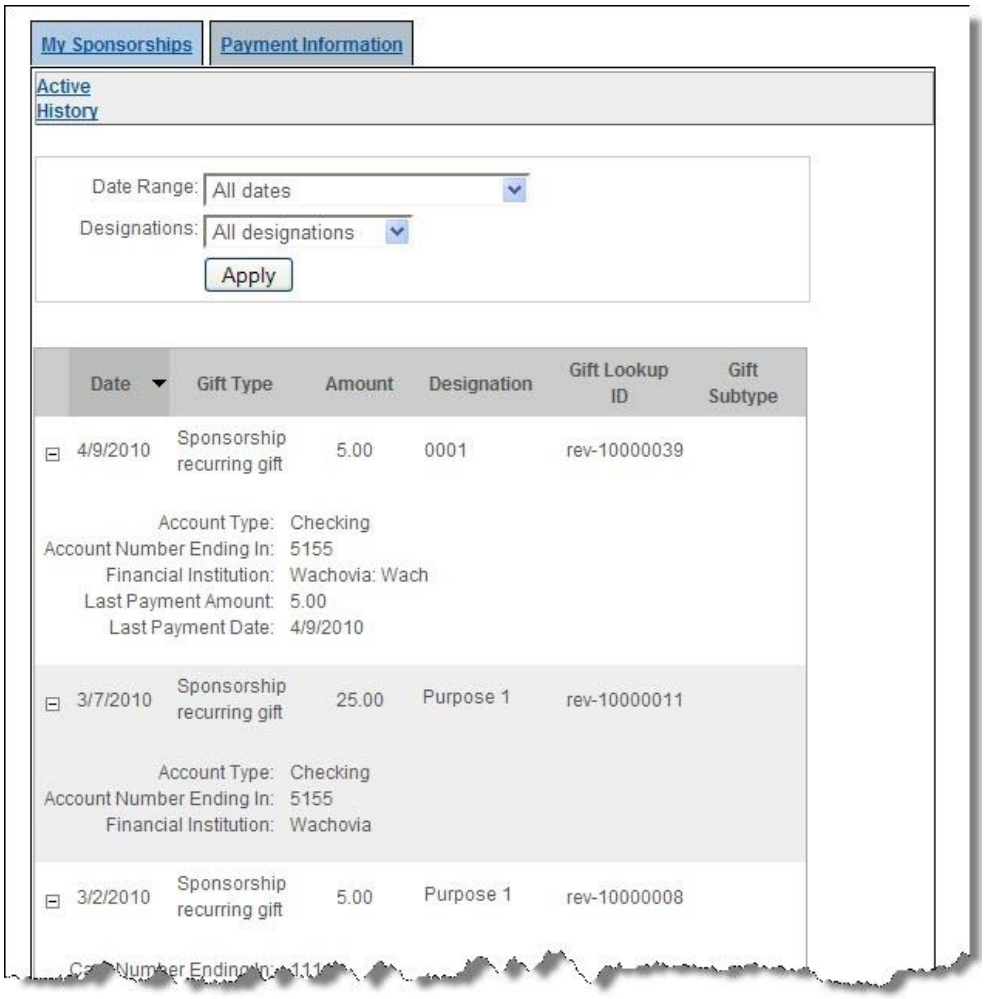
Sponsorship Status

The Sponsorship Status part provides a dashboard for website users to view information about their current sponsorships. When you create the part, you select the features to include in the dashboard.

The Sponsorship Status contains two tabs. On the My Sponsorships tab, sponsors view documentation items about their sponsorships, such as videos or newsletters. If you allow email, sponsors can send an email to their sponsorship. The email is “blind” so the recipient does not view the sponsor’s email address.



On the Payment Information tab, sponsors can view their recurring gift payments made for active and expired sponsorships.

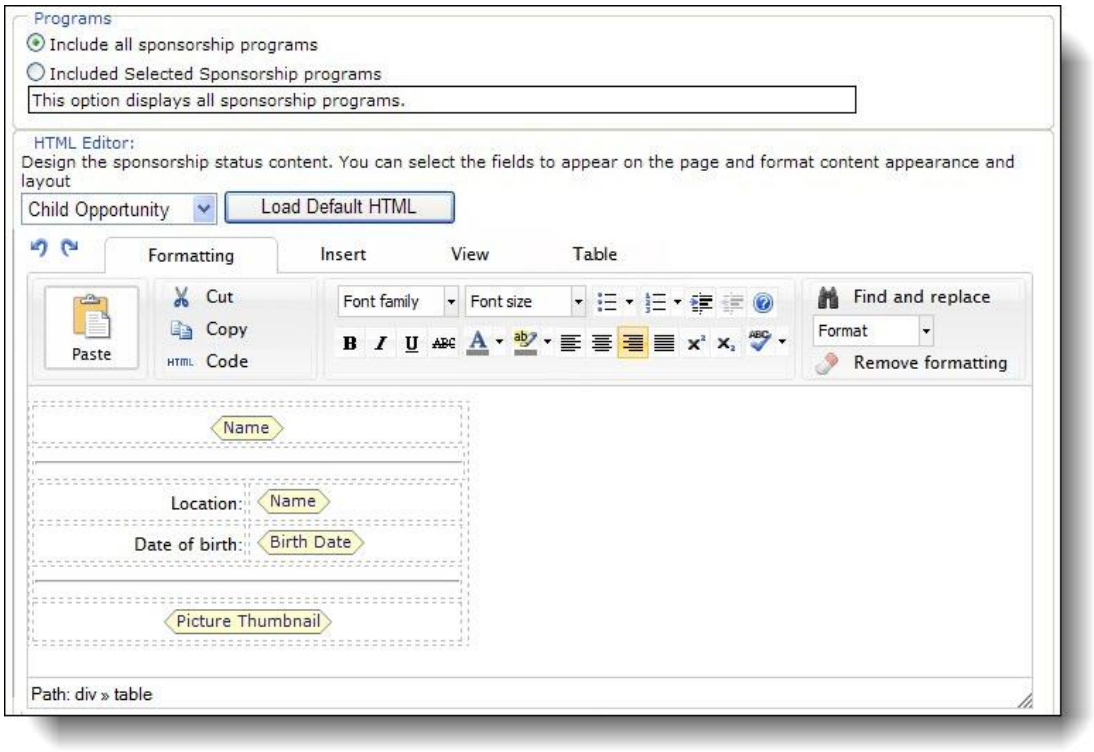


Sponsorship information integrates from Blackbaud CRM. For more information, see the Blackbaud CRM *Sponsorship Guide*.

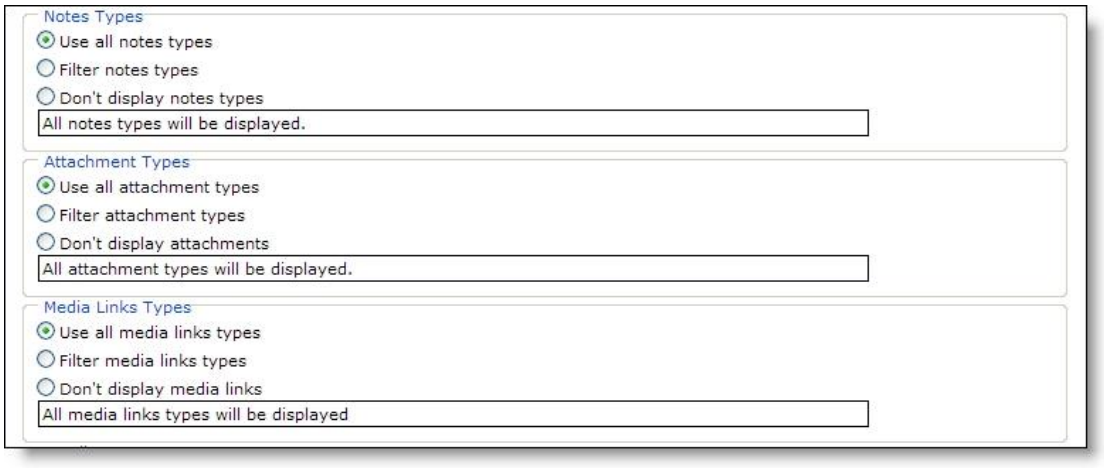
Design Sponsorship Status

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, under **Programs**, select the opportunities from sponsorship programs to include. Select **Include all sponsorship programs** or **Include selected sponsorship programs** to select programs to include.



2. Under **HTML Editor**, enter the text to appear for status information. To customize fields on the page and format the content's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.
3. Under **Notes Types**, **Attachment Types**, and **Media Links Types**, select the documentation items that users can view to learn more about their sponsorship opportunity.

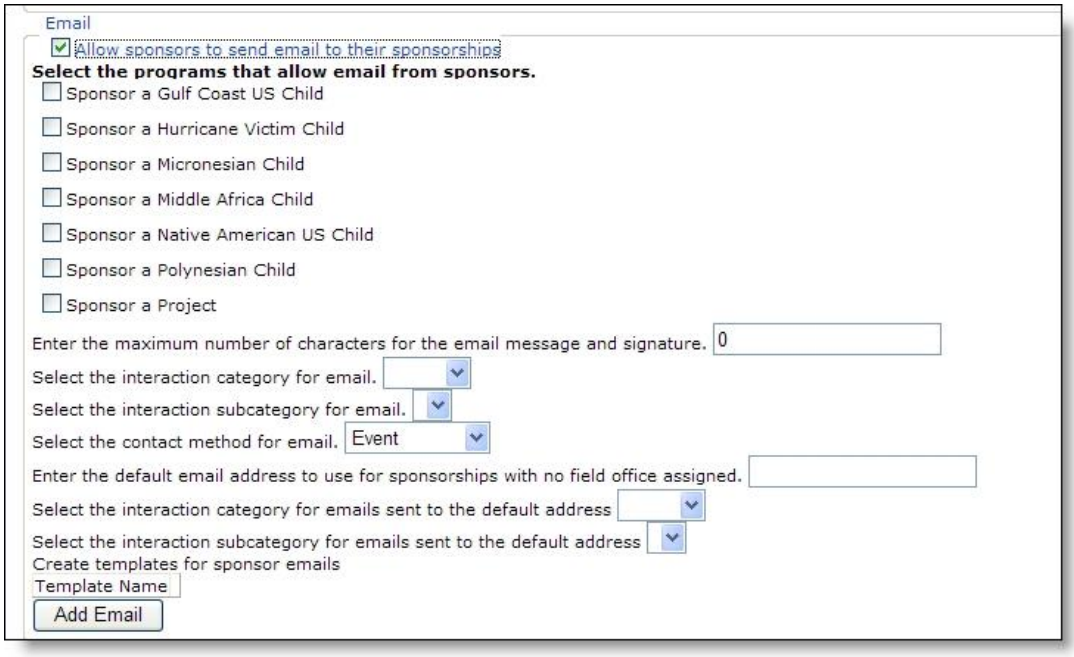


- To allow users to view all documentation types associated with the sponsorship opportunity, select **Include all types**.
- To filter the list of items that users can view, select **Include selected types**. In the list that appears, select the documentation types to include. Website users view the items you select.

- If you do not want the documentation type to display on the web page, select **Do not include types**.

Documentation types integrate from Blackbaud CRM. If you do not see the documentation information you need, create it in Blackbaud CRM. For more information, see the Blackbaud CRM *Sponsorship Guide*.

4. Under **Email**, select **Allow sponsors to send email to their sponsorships** to allow sponsors to email their sponsorships. Several options appear:



   a. **Select the programs that allow email from sponsors** — Select the programs from Blackbaud CRM that allow sponsors to email their sponsorships.

   b. **Enter the maximum number of characters for the email message and signature** — Enter the maximum number of characters sponsors can use in messages and signatures.

   c. **Select the contact method for email** — Select the contact method to use on the sponsor's Interactions page in Blackbaud CRM for emails sent to sponsorships.

   d. **Select the interaction category for email** — Select the interaction category to use on the sponsor's Interactions page in Blackbaud CRM for emails sent to sponsorships.

   e. **Select the subcategory for email** — Select the interaction subcategory to use on the sponsor's Interactions page in Blackbaud CRM for emails sent to sponsorships.

   f. **Enter the default email address to use for sponsorships with no field office assigned** — Enter the default email address to use for sponsorships with no field office assigned in Blackbaud CRM.

   g. **Select the interaction category for emails sent to the default address** — Select the interaction category to use on the sponsor's Interactions page in Blackbaud CRM for emails sent to sponsorships that use the default address.

   h. **Select an interaction subcategory for emails sent to the default address** — Select the interaction subcategory to use on the sponsor's Interactions page in Blackbaud CRM for emails sent to sponsorships that use the default address.

i. **Create templates for sponsor emails** — Click **Add Email** to create an email template for sponsors. You can add multiple templates. Use the email editor to design the appearance and include any text and merge fields for the message. Sponsors can add text to the template they choose to personalize their message. The email editor includes the **Message**, **Signature**, **Opportunity ID**, and **Sponsor ID** merge fields:

Message — Inserts a text area where sponsors enter their message.

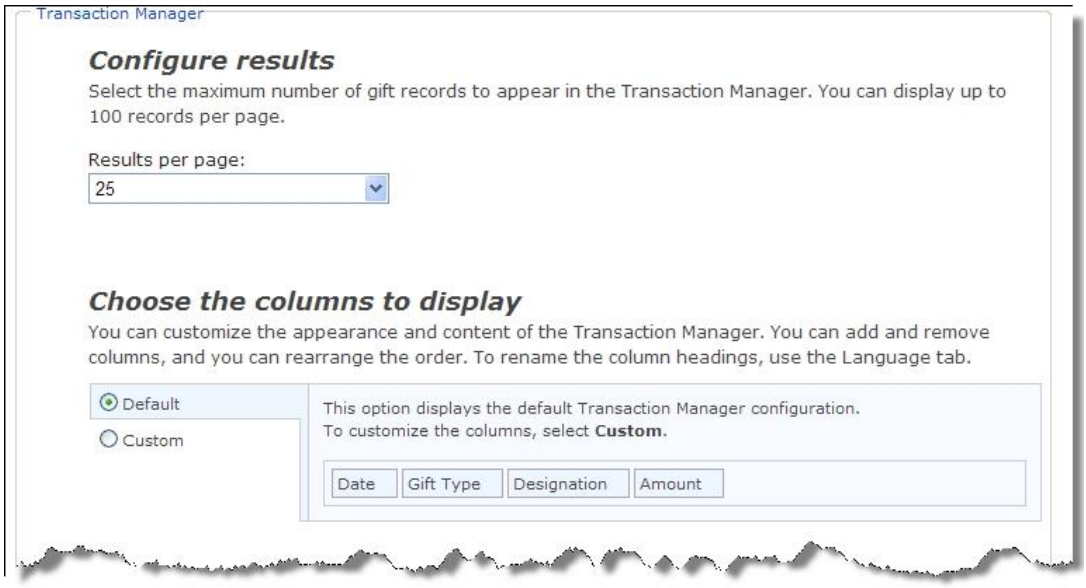
Signature — Inserts a text area where sponsors enter their email signatures.

Opportunity ID — Inserts the opportunity's name.

Sponsor ID — Inserts the sponsor's name.

For information about how to create an email message, see the *Email Guide*.

5. In the **Transaction Manager** frame, you can customize the recurring gift information that appears on the Active and History tabs. These are the same options that appear in the Transaction Manager part for recurring gifts. For more information about options in the Transaction Manager, see Transaction Manager on page 168.



6. Click **Save**. You return to *Parts.*

Suggested Content

With the Suggested Content part, you can create recommendations for website users to visit other areas of your website. For example, you can use the part to direct users to articles or donation forms that are related to the content on the pages they visit. The part displays short summaries about suggested content and links to the pages with the content.

The Suggested Content part uses tags and user interests to determine the content that it recommends. When you create parts for your website, you associate tags and users interests with them and select whether to make the parts eligible for Suggested Content parts. Then when you create a Suggested Content part, you select the tags and users interests to use to generate recommendations. If you assign tags to designation records in Blackbaud CRM, you can also use this part to suggest designations to users.

Note: For the Suggested Content part to be effective, you must associate tags and user interests with the parts on your website. If you do not maintain these tags and user interests, the Suggested Content part cannot recommend the most relevant content or keep recommendations up to date. To associate tags and user interests with parts, use the Tags tab. For more information, see Tags Tab on page 15.

When a user visits a page that includes a Suggested Content part, it recommends other parts that most closely match its tags and user interests. As you update the content on your website, the part automatically updates its recommendations to reflect the changes. For example, when you add new parts or edit the tags and interests associated with existing parts, the Suggested Content part updates its suggestions to take these changes into account.

To determine the content to recommend, the Suggested Content part assigns point values to the tags and user interests that it includes. It then assigns point values to all parts on the website that are eligible for the Suggested Content part. When the Suggested Content part creates its recommendations, it selects randomly from all eligible parts but emphasizes the parts with the most points. This allows the part to avoid recommending the same content repeatedly and still focus on the most relevant content. After the part selects the parts to recommend, it organizes the items to display the most recently edited or created first.

To assign point values, the Suggested Content part performs several calculations.

- For tags associated with the Suggested Content part, the part assigns points based on user history. When website users visit your website, the program tracks the content they view. For each part that a website user views, the Suggested Content part assigns points to the tags associated with that part. The number of points depends on how often and how recently the user viewed the part. For each view, tags receive five points, but this decreases to one point during the course of seven days.
- For user interests associated with the Suggested Content part, the part assigns 20 points for each match to a user interest in a website user's profile.
- For parts that are eligible for the Suggested Content part, the part adds the points from all the tags and user interests associated with the parts and then subtracts points for each time a user viewed the parts. The number of points it subtracts depends on how recently the user viewed the part. For a recent view, the part subtracts 25 points, but this decreases to 5 points during the course of seven days.

Design Suggested Content

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

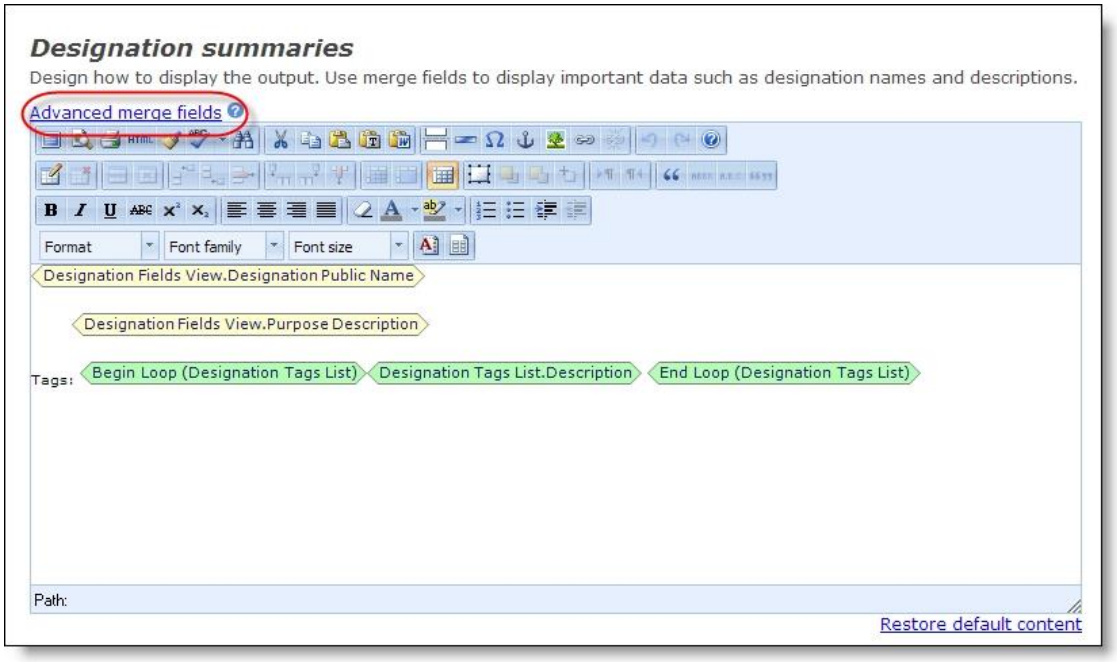
1. From the Design tab, under **Content source**, in the **Types of content to suggest** field, select the source for content. If you select "Parts", the program creates recommendations for parts based on their associated tags. If you select "Designations" the program creates recommendations for designations based on tags associated to designation records in Blackbaud CRM.

2. If you selected "Designations" as the content type, under **Designation summaries**, design the suggested content display. Use merge fields to include information about recommended designations. The text box includes the **Public Name**, **Purpose Description**, and **Designation Tags List** merge fields by default. If you need other merge fields, click **Advanced merge fields** to select additional field groups. After you

select field groups, the **Merge fields** button on the Insert tab in the toolbar appears so you can add the additional merge fields to the display.

To format the content's appearance and layout, use the HTML editor. For more information about the HTML editor, see the *Program Basics Guide*.

Tip: To include an **Add to cart** link, insert the **Desigation.BeginAddtoCart** and **Designation.EndAddtoCart** merge fields. Users can click this link to add designations in the search results to their shopping carts.



3. Under **Layout options**, in the **Number of items to display** field, select how many suggestions to display. You can recommend up to 30 items.
4. In the **Orientation** field, select whether to display suggestions in a horizontal or vertical list.

5. Under **Tags to include**, select the tags and interests to include in the suggested content. By default, the part includes all eligible tags and interests.

Note: If you selected "Designations" in the **Types of content to suggest** field, you select tags for designations rather than parts.

- To remove a tag or interest, click **Remove tag** for it in the **Include** box. To remove all tags and interests, click **Remove all**. The tags and interests you remove appear under **Exclude**.
- To add a tag or interest back to the part, click it under **Exclude**. To return all tags and interests, click **Include all**.

Note: Tags are keywords or phrases that describe the content on parts and allow you to link to similar content. User interests are attributes associated with constituent records. For the Suggested Content part to be effective, you must associate tags and user interests with parts throughout your website. If you do not maintain these tags and user interests, the part cannot recommend the most relevant content or keep its suggestions up to date. For information about how to associate tags and user interests with parts, see Tags Tab on page 15. For information about how to capture user interests for website users, see User Interests Form on page 179.

6. Click **Save**. You return to *Parts*.

Survey

With the Survey part, you can create surveys to learn more about your website users. After users submit responses, you can view a summary of responses, view response details, clear responses, and refresh the survey results on the bottom of the Design tab.

If website users are logged in to your website, you can download their survey responses to constituent records in Blackbaud CRM. To access survey responses from the constituent records, click **Surveys** under **More information** or select **Tasks**, **More information**, **Surveys** in the menu bar. The Surveys page appears, and you can view all surveys completed and the survey responses for each one.

For more information about how to download survey transactions, see the *Web Transactions Guide*.

You can add several types of survey questions in multiple formats.

Choice - One Answer (Vertical) — Select this to ask a question that allows respondents to select an answer from a vertical list. To allow respondents to enter an answer that is not provided, you can add an **Other** selection.

Choice - One Answer (Horizontal) — Select this to ask a question that allows respondents to select an answer from a horizontal list.

Choice - One Answer (Dropdown) — Select this to ask a question that allows respondents to select one answer from a drop-down list. To allow respondents to enter an answer that is not provided, you can add an **Other** selection.

Choice - Multiple Answers (Vertical) — Select this to ask a question that allows respondents to select multiple answers from the vertical list. To allow respondents to enter an answer that is not provided, you can add an **Other** selection.

Choice - Multiple Answers (Horizontal) — Select this to ask a question that allows respondents to select multiple answers from a horizontal list.

Matrix - One Answer Per Row — Select this to ask a question and arrange possible answers in columns. The respondent can select one answer per row.

Matrix - Multiple Answers Per Row — Select this to ask a question with possible answers arranged in columns. The respondent can select multiple answers per row.

Matrix - Multiple Answers Per Row (Dropdown) — Select this to ask a question with possible answers arranged in columns. The respondent can select multiple drop-down answers per row.

Open Ended - One Answer — Select this to ask a question that allows one text answer no longer than a single field. You can define the maximum number of characters a respondent can use in his answer.

Open Ended - Multiple Answers — Select this to ask a question that allows multiple text answers no longer than a single field. You can define the maximum number of characters a respondent can use in his answer.

Open Ended - Essay — Select this to ask a question that allows a text answer longer than a single field. You can define the maximum number of characters a respondent can use in his answer.

Open Ended - Constant Sum — Select this to ask a question that requires a numerical answer. You can define an amount all answers must total.

Open Ended - Date — Select this to ask a question that requires a date as an answer. The respondent can enter the date in the field or click the calendar button to select the date.

Presentation - Text — Select this to add text to the survey, such as a message to thank the respondent for taking the survey.

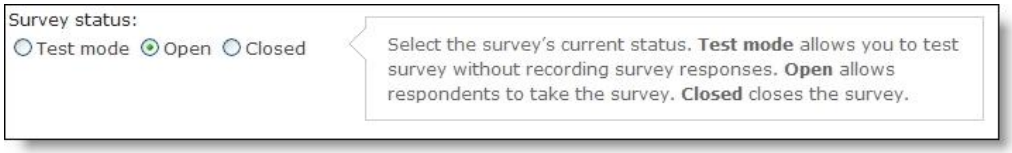
Presentation - Image — Select this to add an image with text to the survey. The text can describe the image, or you can leave the text box blank and add questions that refer back to the image.

Presentation - Page Break — Select this to add a page break between survey questions.

▶ Design Survey

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

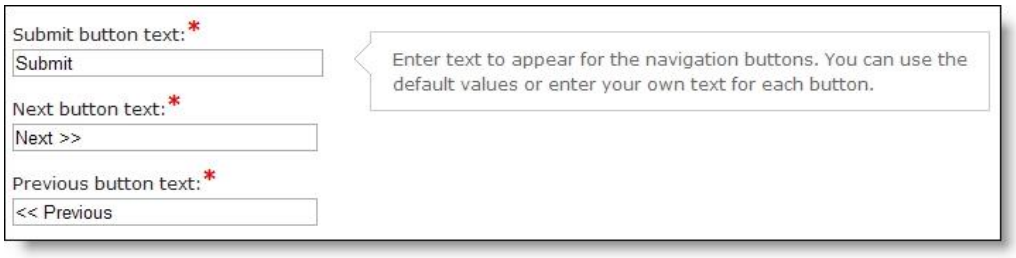
1. From the Design tab, under **Survey status**, select the survey's current status.



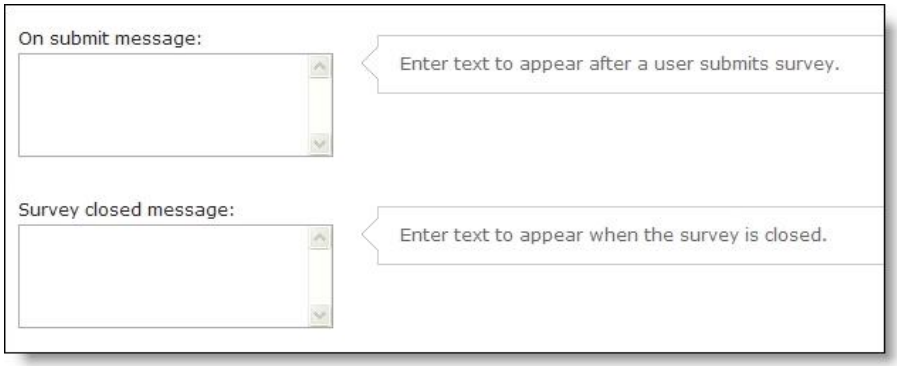
   - **In Test Mode** — Select this to test the survey. The program does not record survey responses entered during Test mode.
   - **Open** — Select this to allow respondents to take the survey.
   - **Closed** — Select this to close the survey. If you select **Allow users to view survey results**, a **Show Survey Results** button appears instead of questions.

2. In the **Title** field, enter a name to appear on your web page for your survey.

3. In the **Subtitle** field, enter additional text about the survey for website users to read.
4. In the **Submit button text**, **Next button text**, and **Previous button text** fields, enter the text to appear for these navigation buttons. You can use the default values or enter different text for each button.

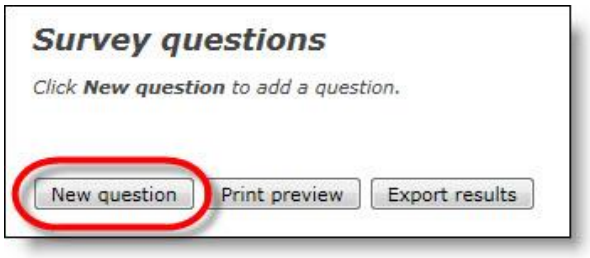


5. In the **On submit message** box, enter a message that appears when the user clicks **Submit**.

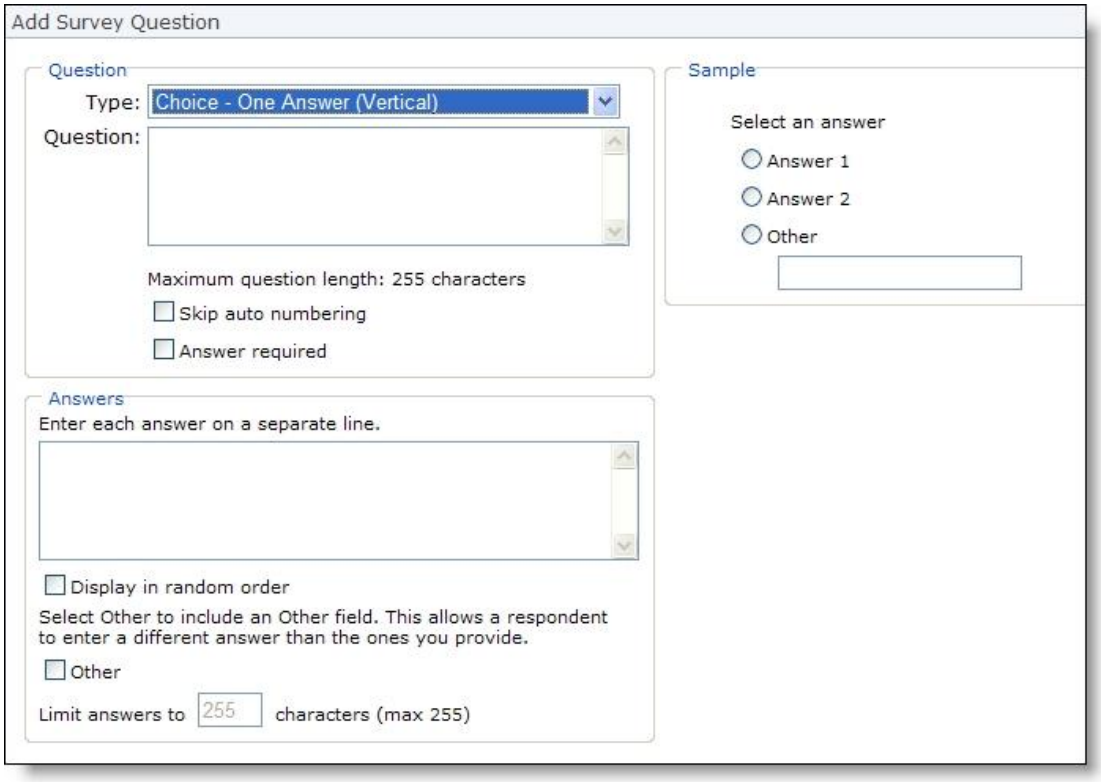


6. In the **Survey closed message** box, enter a message to appear to notify users when the survey is closed.
7. To add a **Display Results** button after the user submits his response, select **Allow users to view survey results**.

8. Under **Survey questions**, to add a question, click **New Question**.



The Add Survey Question screen appears.



Note: When you select a question type, a sample appears under **Sample**.

a. Under **Question**, in the **Type** field, select the type of question to add. The options that appear in the **Question** and **Answers** frames depend on the selected question type.

   After a user submits a response, you cannot edit questions for a survey.

b. In the **Question** field, enter the question to ask.

c. To not have the program automatically number the survey questions, select **Skip auto numbering**.

d. To require respondents to answer the question before they can submit the survey or move to the next page of a multi-page survey, select **Answer required**.

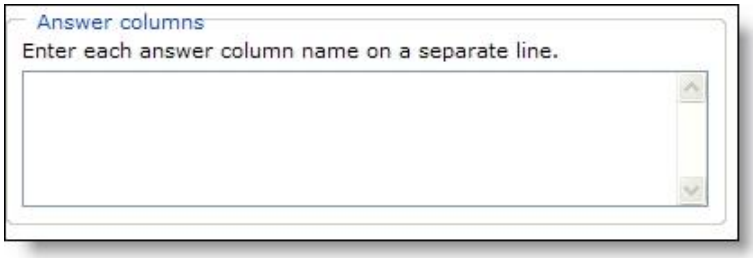
e. Under **Answers**, enter possible answers on separate lines. Enter the first answer choice in the box and press **ENTER** on your keyboard. On the second line, enter the second answer choice and press **ENTER**. Continue until you have entered all possible answers.

f. To display answers in random order, select **Display in random order**.

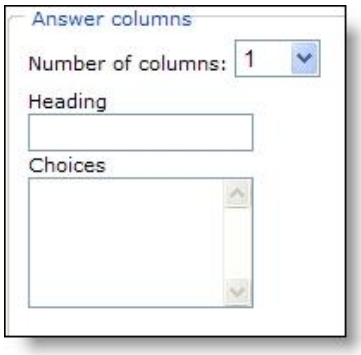
g. If you select a choice question type, **Other** appears. To add **Other** as an answer choice with a text field for respondents to enter their response, select this checkbox and, in the **Limit Answers to [ ] characters** field, enter the maximum number of characters a respondent can enter in his answer.

h. If you select an open-ended question type, in the **Limit answers to [ ] characters** field, enter the maximum number of characters a respondent can enter in his answer.

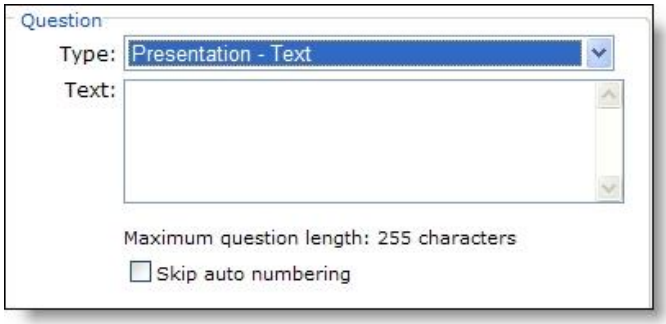
i. If you select a matrix question type, the **Answer columns** frame appears. Enter answer column names on separate lines.



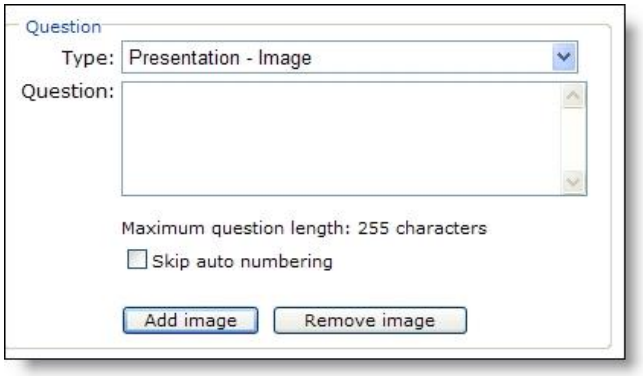
j. If you select a "Matrix — Multiple Answers per Row (Dropdown)" question type, in the **Number of columns** field, select the number of columns to appear. In the **Heading** fields, enter a heading for each column. In the **Choices** box, enter answer choices for each column on separate lines.



k. If you select a "Presentation — Text" question type, in the **Text** box, enter the text to appear.



l. If you select a "Presentation — Image" question type, in the **Question** box, enter the text to appear. To insert an image, click **Add image**. The Select Image from Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.



m. Click **OK**. You return to the Edit Part screen and the new question appears at the bottom of the screen.

9. To generate a print preview of the survey, click **Print preview**.

Tip: Users with create and edit rights or Supervisor rights can print survey results to a PDF or export them to a .csv file when accessing the survey part on a page.

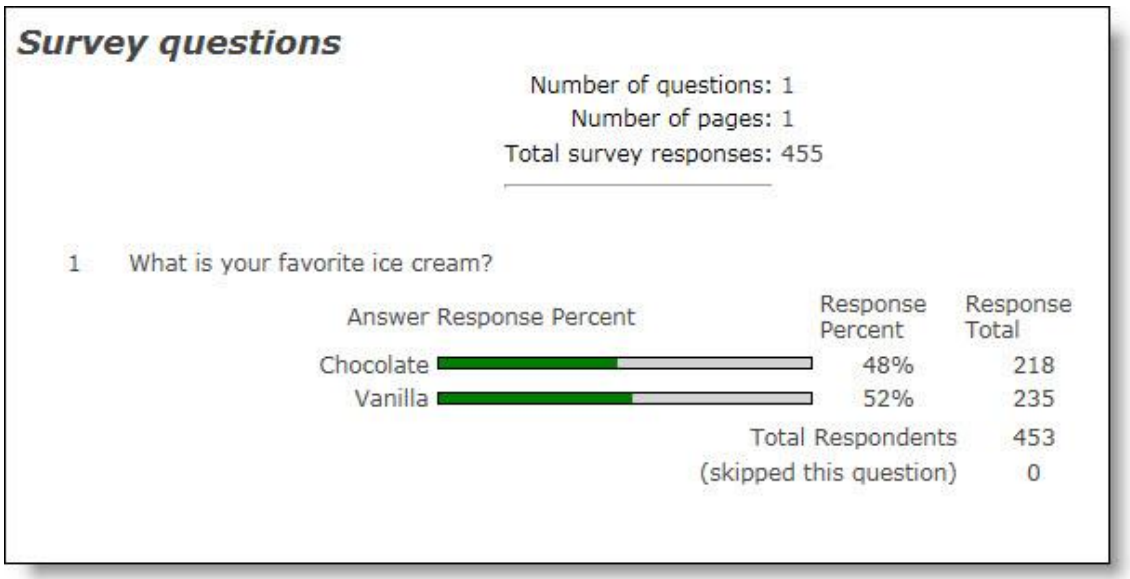
10. To export results into a .csv file, click **Export results**.

Note: After you receive responses to the survey, the **View response details**, **Clear responses**, and **Refresh results** buttons appear beside **Print preview** and **Export results**. For more information about these buttons, see Survey Response Data on page 162.

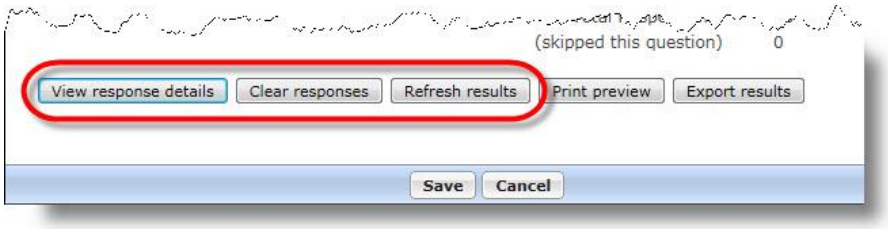
11. Click **Save**. You return to *Parts*.

Survey Response Data

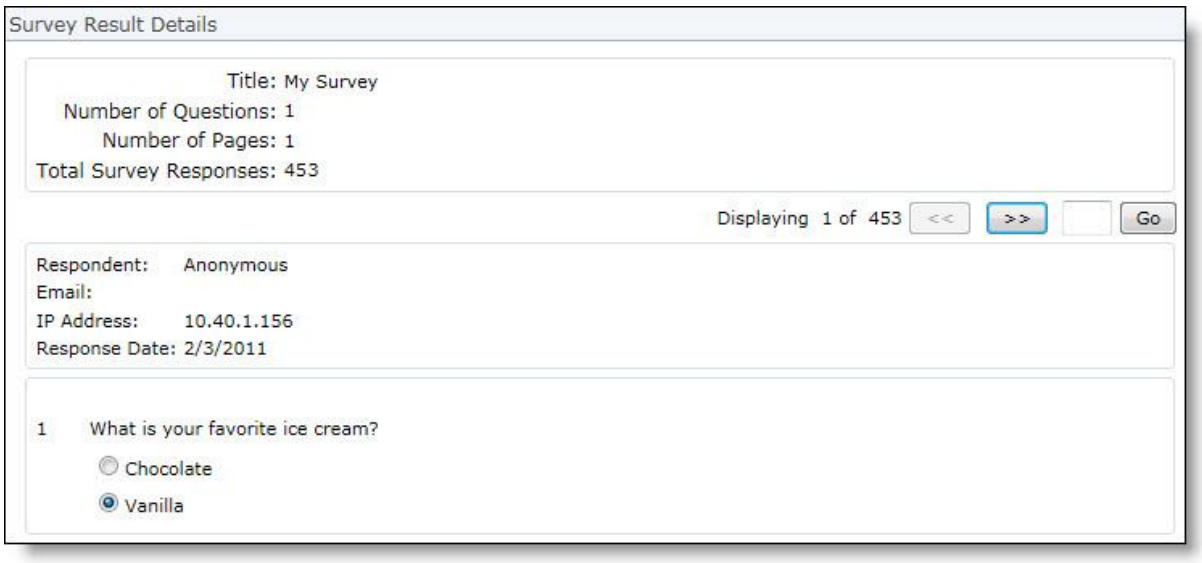
After you receive responses to the survey, response data appears under **Survey questions** on the Design tab. For example, you can view the number of questions in your survey, the page count for the survey, and the number of survey responses. Also, the tab displays each question and calculates information about the responses such as the percentage or respondents for a question.



After the summary response information, the **View response details**, **Clear responses**, and **Refresh results** buttons appear beside **Print preview** and **Export results**.



To view the details for each survey response, click **View response details**. The Survey Response Details page appears and includes details about the respondent and the answers to your questions.



After you close a survey and report on its results, you can click **Clear Responses** on the survey part to remove the responses from respondent records. Also, you cannot edit survey questions after a user submits a response. If you need to edit the questions but have already downloaded a response, you can click **Clear Responses** to make the questions editable. When you click **Clear Responses**, a message appears to make sure you want to delete them. Also, an additional transaction appears in the responses count on the Web Transactions page and is included in the total download count after you process the transactions. Survey responses do not clear from records until you process this transaction, but you can edit survey questions immediately after you click **Clear Responses**.

To make sure you have the latest response data from your website, select **Refresh results**.

Tag Display

With the Tag Display part, you include words or phrases related to a page's content as hyperlinks on the page so users can quickly access similar content on your website. You can also display all tags in use in the program so users can navigate to areas of your site. When a user clicks a tag, a search results page appears. The search results include all pages with the selected tag. Users can also search for tags. Enter "tag:" followed by the exact tag name in a Search **field** to view all pages that contain a matching tag.

When you include a tag display, you provide website users a more precise way to locate information because you assign tags to only relevant parts. For example, you add the tag "Tournament" to Event Registration Form parts

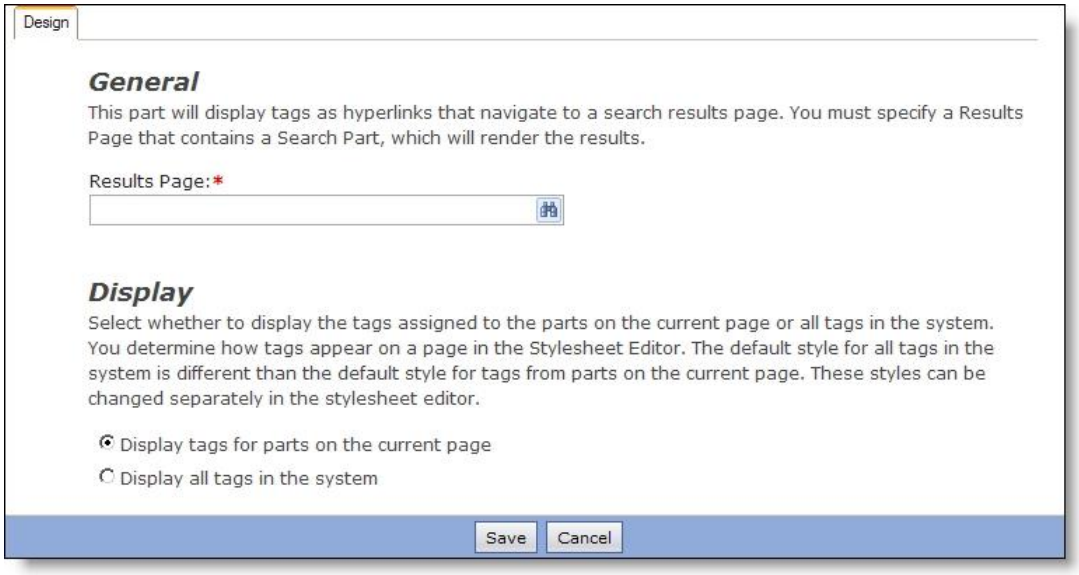
you create for different golf tournaments your organization hosts. When a user views a page with this tag and clicks the **Tournament** link, the search results include links to all pages that contain a part with the "Tournament" tag. If a user entered "Tournament" in a **Search** field, the search results may include pages that contain the word "Tournament" but are not directly related to your organization's events.

You can create and apply tags to parts from the Tags tab on the Edit Part screen. When you build a page, each part you add may contain its own list of tags. From the Edit Part screen, you can choose to display only the tags assigned to the parts on the page or all tags used on your site. For information about how to add tags to a part, see Tags Tab on page 15.

Design Tag Display

The tag display is linked to a search results page, so you must create this page before you add a Tag Display part. For information about how to create a search results page, see Learn About Search on page 132. For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Results Page** field under **General**, browse to the page to display search results on.



Note: Only pages you added a Search part to appear on the Select a Page screen. The page grid does not include pages based on templates that contain a Search part.

2. Select the tags to include in the tag display.
   - To display only tags defined for parts on the page, select **Display tags for parts on the current page**. When you add this part to a page, only tags assigned to other parts on the page appear.
   - To display all tags in use, select **Display all tags in the system**. You can use this option to create a tag display that includes all tags on your website. This provides another layer of navigation because users can navigate your site based on types of content.

Note: By default, the tag display appears with a "Tags:" header and a comma separates each entry in the list. You can edit this heading and delimiter from the Language tab. For information about how to edit the Language tab settings, see Language Tab on page 10.

Note: Each display option has a default format. If you select **Display tags for parts on the current page**, when

you add the part to a web page, the tag display appears as a horizontal line of text with each entry separated by a comma. If you select **Display all tags in the system**, the tags appear as a vertical list, with each entry on a separate line. To change the appearance and orientation of the tag display, you can apply custom styles to tag elements for the appropriate style sheet. For information about how to manage style elements, see the *Website Design Guide*.

3. Click **Save**. You return to *Parts*.

Targeted Content

With a Targeted Content part, you can target information or features on a web page to different users based on roles or the individual user. For example, you may want Major Donors to see a donation form designed specifically for them, but you want all other users see the standard donation form. Use a Targeted Content part to attach both donation forms on the same web page. When a major donor accesses the page, the first donation form appears. When other users access the page, the second donation form appears.

Design Targeted Content

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, create a part or add an existing part.

- To create a part to appear on the web page for a targeted audience, click **Add New Part**. The New Part screen appears.
- To select an existing part for a targeted audience, click **Add Existing Part**. The Select a Part screen appears.

a. Select the part for the targeted audience, such as “Major Donor Donation Form.”

b. Click **Select**. You return to the Design tab. The **Targeted Roles and Users** column displays the roles and users associated with the selected part. This determines who sees the targeted content on the web page with the Targeted Content part.

   To display a complete list of roles and users associated with a part, hover over the row in the **Targeted Roles and Users** column.

Note: The first part in the list appears first on the web page for the roles and users associated with the part. For example, the Major Donor Donation Form you selected has view rights for the Major Givers role. When users in this role log into the website and access the donation page, they see a form designed specifically for them that other user roles do not see.

2. Create additional parts or include existing parts as necessary for the targeted content. You can include as many parts as you want. For example, you can include the “Healthcare Donation Form” for users in the healthcare profession and the “Simple Donation Form” for the rest of your donors.

Note: When a user accesses a page with a Targeted Content part, the first part in the list that includes that user or the user’s role appears. For example, Mark Adamson is a member of the Board Members role. When he accesses the donation page, he does not view the Major Donor Donation Form or Healthcare Donation Form parts because those parts are not associated with the Board Members role. Mark views the Simple Donation Form part because he is a user in the Board Members role. If the users or user’s role is not included in any parts on the Targeted Content part, nothing appears in that area on the web page.

3. On the Design tab, the first column displays three action buttons.
   a. To move a part in the list, click and drag the dotted button on the far left.

Tip: If you move a part, remember that users with multiple roles see the first part in the list that is associated with one of their roles. For example, Renee Wilson is a major donor, cardiologist, and board member. When she accesses the donation page, she views the Major Donor Donation Form because that part is listed before the other parts on the Design tab.

   b. To edit a part, click **Click here to edit this part**. For example, to add a role to view the targeted content, click this button to access the Targeting & Security tab for the part.

      For information about users and roles, see the *Users & Security Guide*.

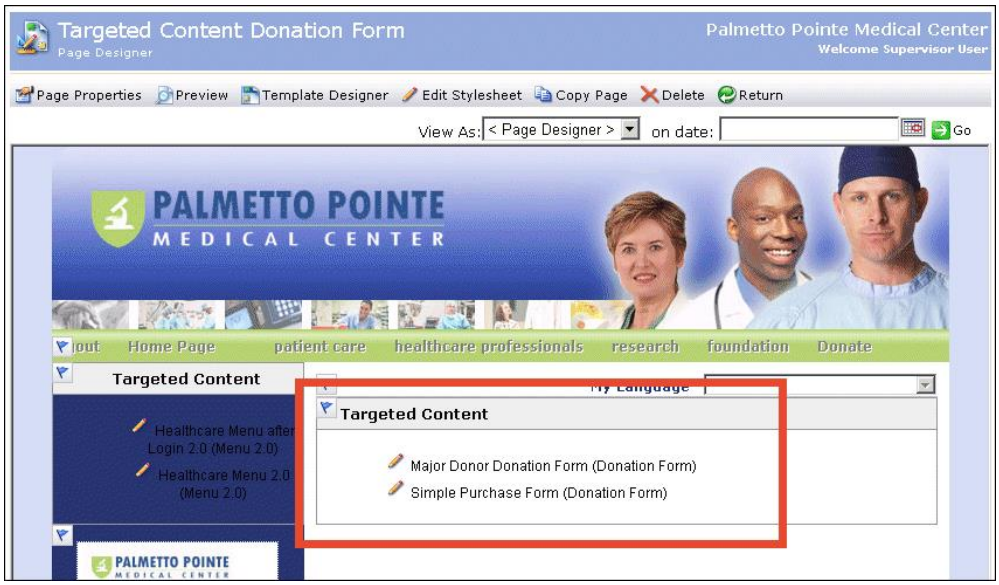
   c. To remove a part from the Targeted Content part, click **Click here to remove this part**.

Tip: If a part in the list appears in red with a strikethrough, it never appears on a web page because all roles and users are included in previous parts in the list. This occurs if you include the Everyone role, which includes all users, in a part that is not last in the list for the targeted content.

4. Click **Save**. You return to *Parts*.

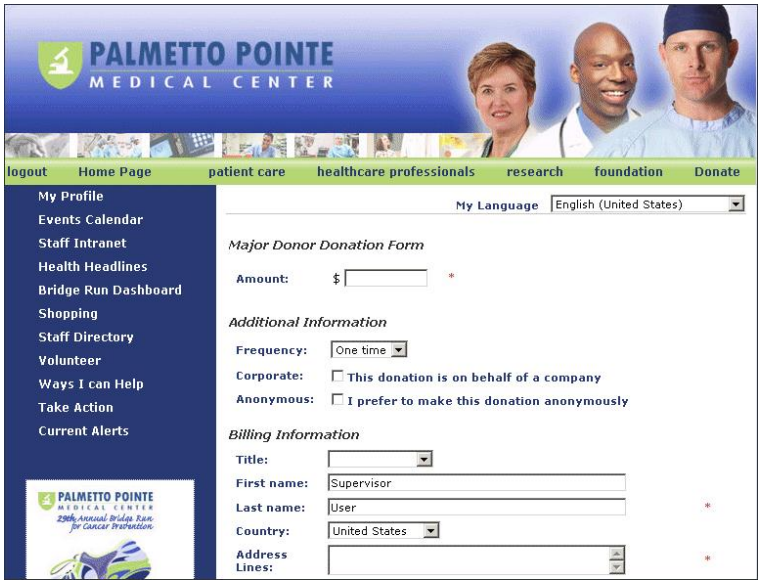
Targeted Content On a Web Page

In *Pages & templates*, when you include a Targeted Content part on a web page, the part appears with **Page part** and **Edit part** buttons.

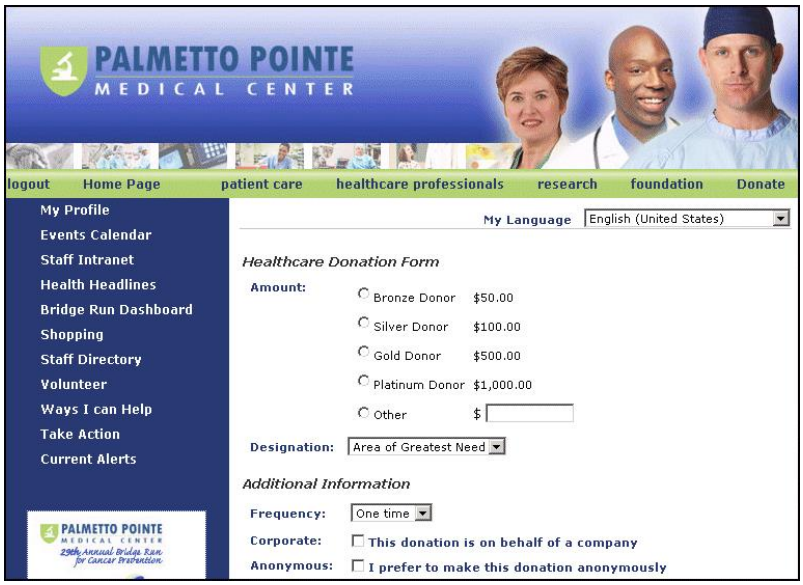


To edit the Targeted Content part, click **Page part**. This button appears as a blue flag icon. To edit a part included in the Targeted Content part, click the **Edit part** button. This button appears as a pencil icon. For more information about *Pages & templates*, see the *Website Design Guide*.

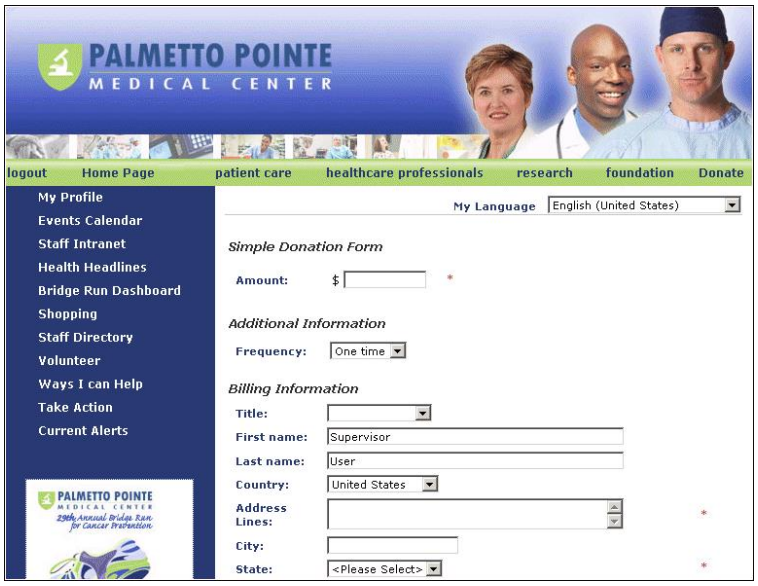
When a user accesses a page with a Targeted Content part, the first part in the list that includes that user's role appears. Using the examples in Targeted Content on page 165, the following donation page appears for users in the Major Givers and Site Administrator roles.



For users in the Cardiologists and Medical Staff roles, the following donation page appears.



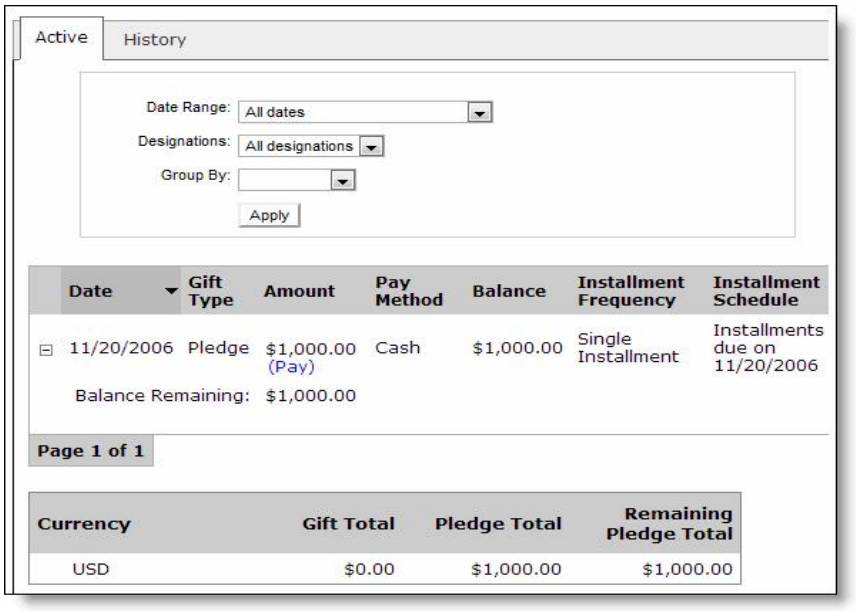
For users in roles such as Board Members and Everyone, the following donation page appears.



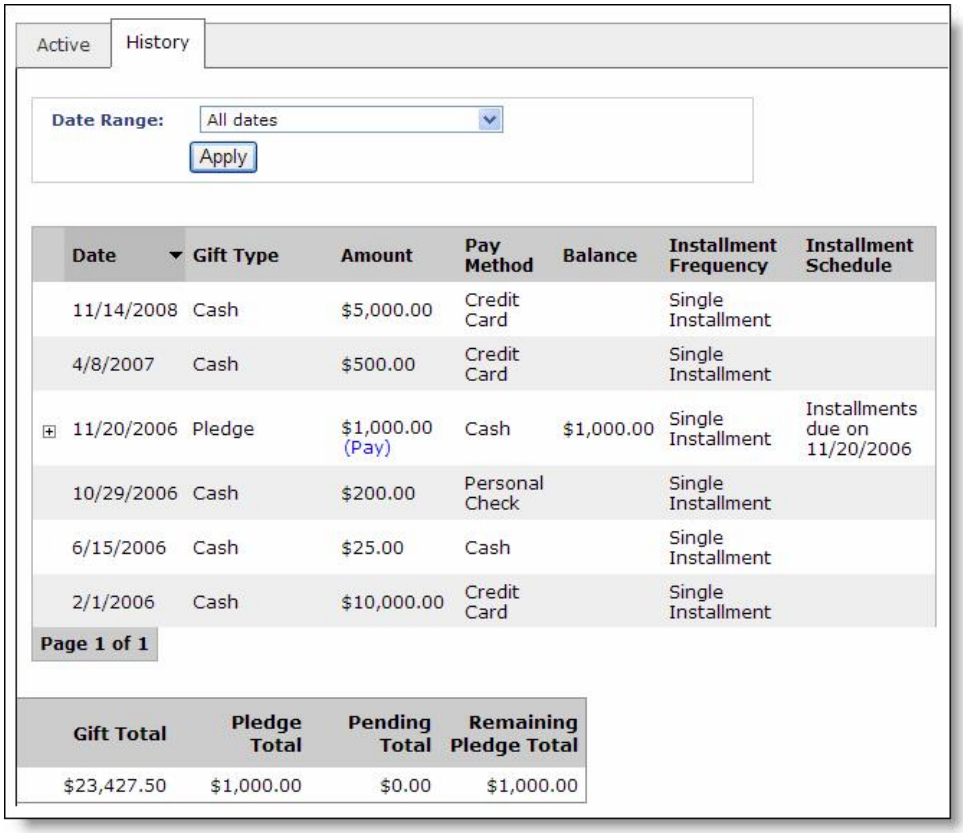
Transaction Manager

With the Transaction Manager part, you can create and display a giving history for donors. When a website user logs in to your website, the Transaction Manager part uses the user's login information to filter his donor information and display it as a customized giving history. With this part, users can view their offline and online gifts, as well as any pending online transactions that have not been processed.

On the website, the Transaction Manager part can display one of two tabs, or both. The Active tab displays current recurring gifts, pledges, event registration fees.



The History tab displays all gifts the user made to the organization for the selected time period or designation. Users can also select how transactions are grouped in the grid. For example, they can group by date or payment method.



On the Transaction Manager part's Edit Part screen, you select the tabs to display and the gifts to include in the giving history. You can include all gifts, filter gifts by gift type or purpose, or use an offline gift query to filter gifts.

The giving history includes a donor's original gift, but it does not include any matching gift from the donor's employer. In addition to your filtering criteria, you can select whether to include recognition credits, also called soft credits, and pending online transactions in the giving history. When you include pending gifts, the gifts appear regardless of any filtering criteria you apply.

You can also choose whether to allow website users to make payments from the giving history toward outstanding pledges. This option is available for donors who select the Pledge (Bill Me Later) payment method or donors for whom you enter a pledge offline. If you allow pledge payments and the pledge will be paid in installments, a **Pay** link appears in the **Amount** column with the pledge entry on the Active and History tabs. The user clicks this link to view a donation form for the pledge and make a payment online. The **Pay** link also appears for unpaid event registration fees. For recurring donations, links appear so users can edit payments, edit payment details, or make additional donations for sponsorships.

Tip: Website users cannot submit recurring gift payments on a Transaction Manager part. In Blackbaud CRM, you create a Generate Payments business process to automatically generate a revenue batch to create payment records for these transactions. For more information about the business process, refer to the Blackbaud CRM *Revenue Guide*.

Tip: The **Pay** link does not appear if a pledge installment or recurring gift is pending, if the total pledge balance is zero, or if the donor submitted credit card or direct debit payment information at the time the pledge was created.

Note: Pledges and pledge payments appear as separate entries on the History tab. From a pledge entry, you can view the remaining balance and the most recent payment. From a pledge payment entry, you can view the date, amount, and balance of the pledge. However, pledge payments include pledge information only when the pledge appears in the giving history. If you filter gifts and exclude a pledge, payments do not include information about the pledge. For example, you can use a gift query to exclude gifts before a certain date. If a pledge is made before that date, the giving history shows subsequent pledge payments but not the pledge details.

If you allow donors to edit recurring gift information, links appear on both the Active and History tabs of the customized giving history. The settings you select from the **Recurring gift details** section determine if donors can change the gift amount and payment schedule, as well as make changes to the credit card or direct debit account associated with the recurring gift.

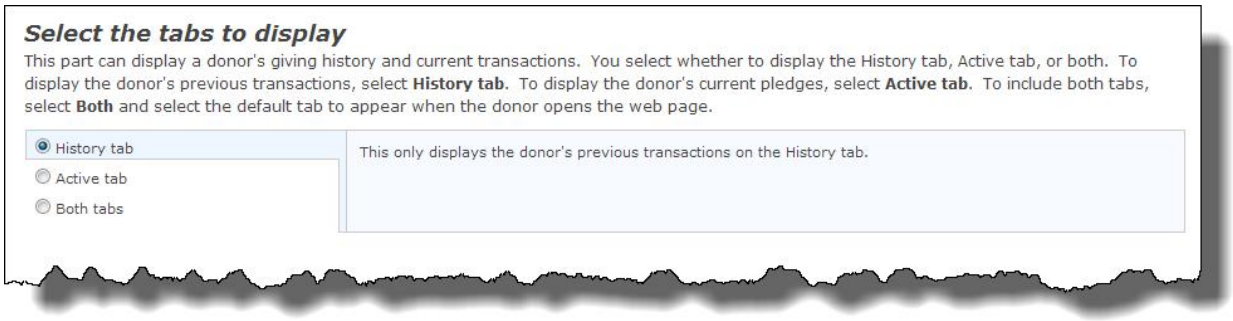
Note: When users update credit card information, the program collects user information on secure payment pages to help you comply with the Payment Card Industry Data Security Standard (PCI DSS). For information about secure payment pages, see Secure Payment Page on page 112.

To customize the appearance and content of the giving history, you can select the columns to display for the donor, edit column headings, and add or remove columns. You can also add a gift summary section.

Design Transaction Manager

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. Under **Select the tabs to display** on the Design tab, select whether to display the History tab, Active tab, or both.

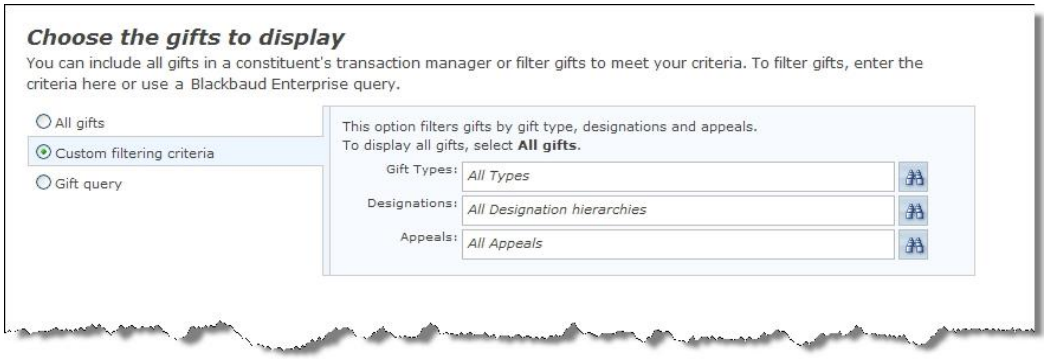


- To display the donor's previous transactions, select **History tab**.
- To display the donor's current recurring gifts, pledges, and event registration fees, select the **Active tab**.
- To display the donor's giving history and current transactions, select **Both tabs**. In the field that appears on the right, select the default tab to display when the donor opens the web page.

2. Under **Configure results**, in the **Results per page** field select how many gifts to include on each page of the giving history.

3. Under **Choose the gifts to display**, select the gifts to include in the giving history.
   - To include all gifts, select **All gifts**.

   - To filter the gifts on the Transaction Manager part, select **Custom filtering criteria**.

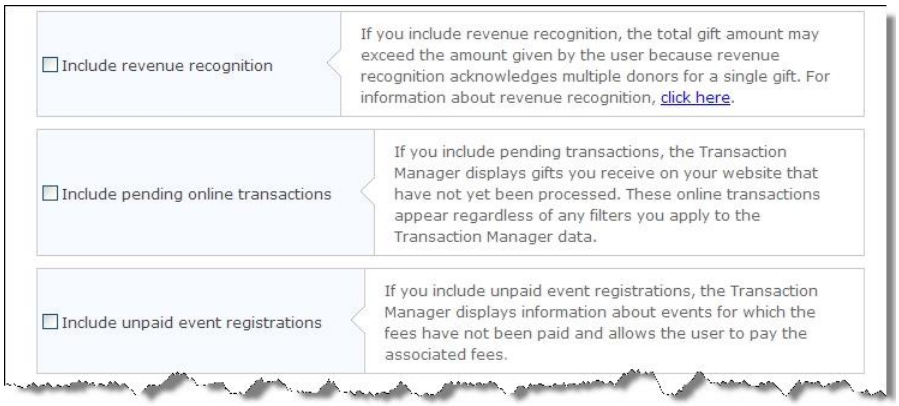


To select the gift types, designations, or appeals to include in the giving history, click the binoculars. On the screen that appears, select your filter criteria.

- To use a gift query from Blackbaud CRM to filter gifts, select **Gift query**.

To select a query, click the binoculars. On the search screen that appears, select a query. For information about the search screen, see the *Program Basics Guide*.

- To include recognition credits, select **Include revenue recognition**.



- To include pending transactions from your website, select **Include pending online transactions**.

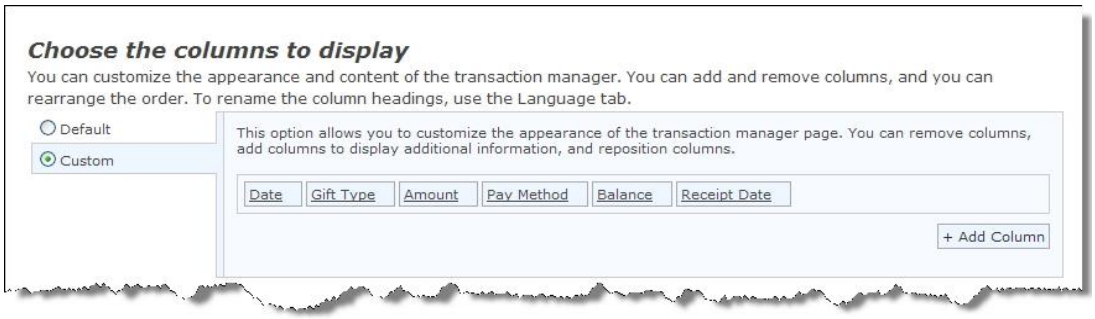
Note: For pending online transactions, only the gift amount, payment method, and gift date appear in the giving history. Other details do not appear until you process gifts.

- To include unpaid event registration fees, select **Include unpaid event registrations**. When you select this option, the **Configure event fee payment** field appears.

4. Under **Choose the columns to display**, select the columns to include in the giving history.
   - To display the default **Date**, **Type**, **Designation**, and **Amount** columns, select **Default**.

Note: The **Gift Type** column includes pending transactions. To avoid redundancy, you can exclude the **Pending** column if you include the **Gift Type** column.

- To include specific columns, select **Custom**.



Click **Add Column** and select each column to include in the giving history. To edit a column, click the column title in the list that appears. You can reposition the column or delete it from the giving history.

Note: An **Export** button appears on the web page so a user can export his active gifts and his giving history. The columns you select to display from this option are the columns that appear in the export output.

5. Under **Choose the summary information to display**, select **Include gift totals section** to include a summary section that displays gift totals.

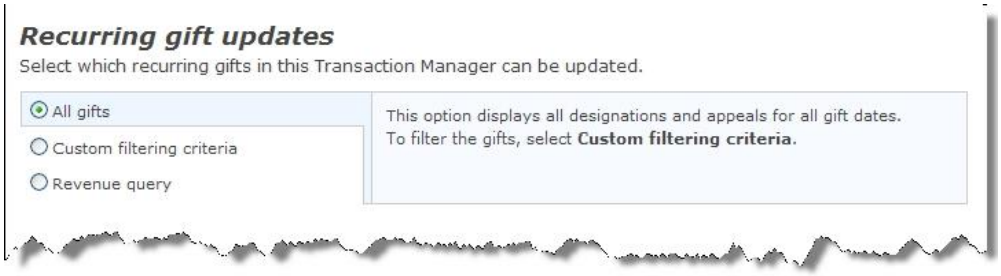
   Additional options appear so you can select the columns to include in the summary section.

Tip: The **Include recognition credits total** and **Include donation amount total** checkboxes appear when you select **Include revenue recognition** under **Choose the gifts to display**.

6. To allow website users to make payments against outstanding pledges, under **Configure pledge payment**, select the web page that contains the donation form to use for pledge payments.

Warning: You must select a donation form that includes credit card or direct debit payments. You should not select a donation form that requires only the Pledge (Bill me later) payment method because website users cannot pay a pledge with another pledge. For information about how to create a Donation Form part, see Donation Form on page 39.

7. To allow website users to pay event registration fees from the transaction manager, under **Configure event fee payment**, select the page that contains a Payment 2.0 part to use for event fees. This option appears only if you selected the **Include unpaid event registrations** option under **Choose the gifts to display**.
8. To allow website users to make recurring gift payments from the transaction manager, under **Configure recurring gift payment**, select the page that contains the donation form to use for recurring gifts.
9. Under **Recurring gift updates**, select the gifts and gift details a donor can update online.

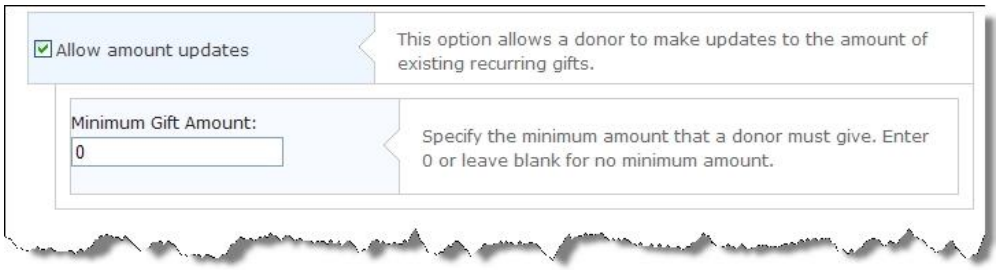


Tip: This section allows you to configure the recurring gift type options you want to make available to website users on the Transaction Manager part. For example, you can allow users to determine the frequency of updated recurring gifts. However, users cannot submit recurring gift payments on the part. In Blackbaud CRM, you create a Generate Payments business process to automatically generate a revenue batch to create payment records for these transactions. For more information about the business process, refer to the Blackbaud CRM *Revenue Guide*.

- To include all recurring gifts, select **All gifts**.
- To limit the recurring gifts a donor can update, select **Custom filtering criteria**.

  To select the designations or appeals to include in the giving history, click the binoculars. Then, select your filter criteria on the screen that appears.
- To use an offline gift query to filter gifts, select **Revenue query**.

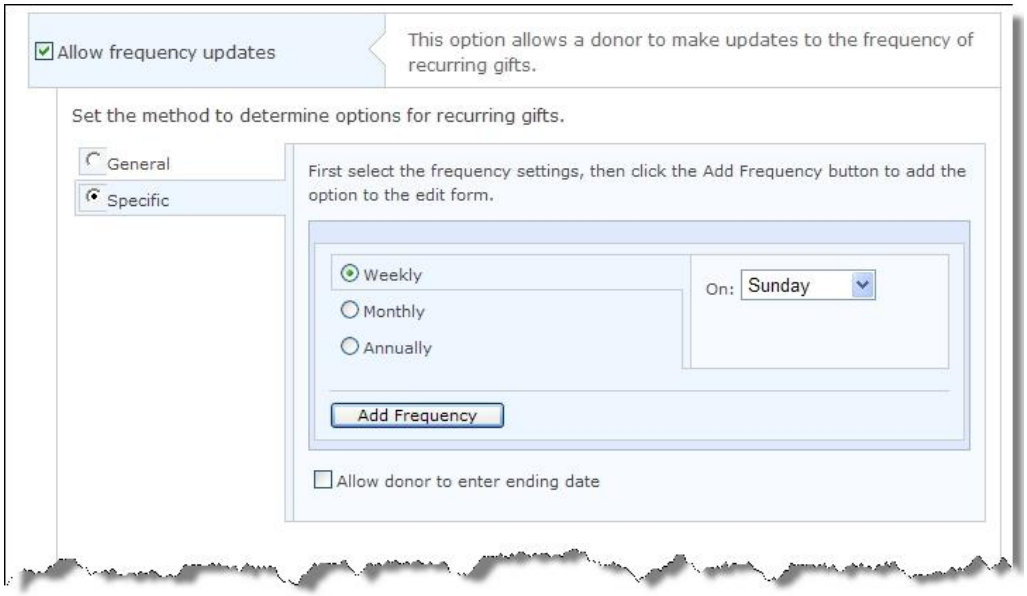
  To select a query, click the binoculars. On the search screen that appears, select a query. For information about the search screen, see the *Program Basics Guide*.
- To allow donors to update the amount of the recurring gift, select **Allow amount updates**. In the **Minimum Gift Amount** field, enter the minimum gift to accept when a donor changes the original gift amount. Enter "0" or leave this field blank to allow donors to enter any amount.



When you select **Allow amount updates** or **Allow frequency updates**, an **Edit Gift Details** link appears under the recurring gift entry on the donor's giving history.

Note: When users update credit card information, the program collects user information on secure payment pages to help you comply with the Payment Card Industry Data Security Standard (PCI DSS). For information about secure payment pages, see Secure Payment Page on page 112.

- To allow the donor to determine the frequency of the updated recurring gift, select **Allow frequency updates**.



If you select **General**, donors can determine the schedule for the recurring gift payment.

Note: If you previously allowed donors to create payment schedules for recurring gifts, you may want to select the **General** option so donors may continue to customize their schedules. If you define multiple payment schedules for donors to select from, they will not have this flexibility.

Select **Specific** to define recurring gift schedules for donors to select from. You can select "Weekly," "Monthly," or "Annually" as the frequency. In the **On** field, select a day or date donors can choose to schedule the gift. To make this frequency update available to donors, click **Add Frequency**.

Note: To add multiple frequency options to the donation form, enter each custom schedule and click **Add Frequency** to add the new schedule to the list.

Select **Allow donor to enter ending date** if donors can specify when the recurring gift ends.

- To allow donors to update credit card or direct debit account information, select **Allow payment updates**.

Note: When you select **Allow payment updates**, an **Edit Payment Method** link appears under the recurring gift entry on the donor's giving history.

10. Click **Save**. You return to *Parts*.

Unformatted Text

Use the Unformatted Text part to embed HTML text or scripts on a page. For example, you can paste in the embed code provided by *YouTube* to display a video. You can also use this part to enable Google *Analytics* E-Commerce tracking features.

For more information about how to configure the program to use Google *Analytics*, see the Administration

Guide.

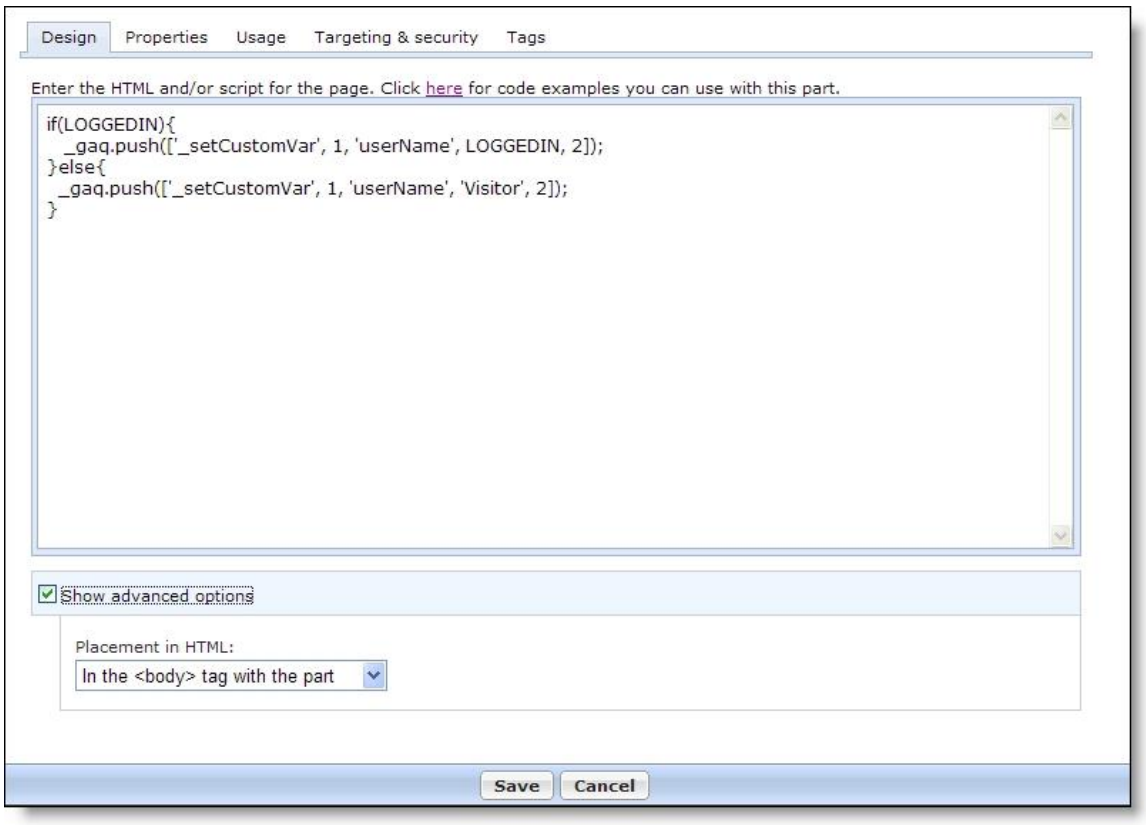
Warning: Code and scripts that you include in this part are beyond of the scope of Blackbaud Support.

Design Unformatted Text

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, enter the HTML code or script in the box.
2. To select additional options for the code, select **Show advanced options**.
3. In the **Placement in HTML** field, select where to place the code in the page's HTML. You can place it in the <head> tag, at the bottom of the <body> tag, or within the <body> tag according to where you place this part on the page.

   Warning: Code and scripts that you include in this part are beyond of the scope of Blackbaud Support.



4. Click **Save**. You return to *Parts*.

User Email Preferences Form

Warning: The User Email Preferences Form has been replaced with the more powerful Communications Preferences Form. This part type appears in *Parts* only if you have saved User Email Preferences Form parts. While the deprecated part continues to operate for backwards compatibility on your website, you can no longer create or copy User Email Preferences Form parts. The Communications Preferences Form in *Forms*

includes all the functionality of the User Email Preferences Form part with enhancements. For example, website users view all communication preferences for your organization on the same page. In addition, you do not have to process data from the form to Blackbaud CRM. When a website user submits a communication preference, the data defaults directly on the constituent record. To display the form on a web page, you must include it on a Form part. For more information, see the *Forms Guide*.

User Email Preferences Form Part Considerations

If your organization uses *Newsletters*, users can subscribe or unsubscribe to newsletters from the User Email Preferences Form. They can also use this form to subscribe or unsubscribe to emails from Chapter Manager parts and notifications. Web pages with the User Email Preferences Form allow nonmembers and members who are not logged in to click a link and update their subscription preferences.

The User Email Preferences Form appears when users access it from links in email, regardless of whether they are logged in. However, if users access the form through the website, it only appears when they are logged in.

Warning: In each email you send, you must include a link to the page of your website that contains this form.

User Email Preferences Form includes opt-out sections for users to subscribe or unsubscribe to individual newsletters, notifications, and Chapter Manager email. Users select checkboxes to subscribe to these email subscriptions, and they clear the checkboxes to opt out of subscriptions. For example, if the form's newsletters section includes five newsletters, a user can select two checkboxes to subscribe to those newsletters and clear the other three checkboxes to opt out of those newsletters.

A global opt-out checkbox also appears on the form to allow website users to opt out of all email communications. For users who selects this global opt-out checkbox, Blackbaud CRM adds the “Do not email” message on constituent records when it processes user profile updates.

To have at least one web page where users can subscribe or unsubscribe from newsletters, you must allow the Everyone user role view rights for at least one User Email Preferences Form you create. You can also create other User Email Preferences Form parts that do not have Everyone security set and require a login, but you must set at least one part for everyone.

Note: Subscriptions derive from newsletters. The website sends subscription email to all constituents on the assigned lists, plus additional subscribers and minus explicit unsubscribers and users with the “Do not email” message in their user profile. The program prevents a duplicate email to the same record in Blackbaud CRM. It does not prevent duplicate emails when the Blackbaud CRM query contains duplicate records.

▶ Design User Email Preferences Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Title** field, enter a title to appear on the web page for email preferences.
2. In the **After update navigate to** field, browse to the page to appear after website users update subscription information. If you do not select a page, the page designated as the Home Page in *Sites & settings* appears for users.
3. Under **Titles**, enter the text to appear on your website in the title bar of your opt-out section for email.
    - In the **Chapter email list title** field, enter the text to appear for chapter email, such as “Chapter List Subscriptions.”
    - In the **Email list title** field, enter the text to appear for regular email.

      The program automatically configures email lists under the opt-out section. Blackbaud Internet Solutions groups “Chapter Manager part name — Chapter name List” for the list. For example,

"Alumni Chapter Manager — San Diego List" is the Chapter Manager part named (Alumni Chapter Manager) — Chapter name (San Diego) List.

- In the **Notifications title** field, enter the text to appear for a notification email.

4. Under **Opt-out checkbox**, customize the instructions that appear for the opt-out section of the User Email Preferences form. In the **Opt-out checkbox label** field, enter the text to appear for the global opt-out checkbox on the website, such as "To no longer receive email from us, select the checkbox."

   For verification purposes, if a user selects to opt out of a newsletter, the user is asked to enter his or her email address. If the email address is not registered with the program, the user cannot opt out of the newsletter.

Note: Even when a user selects the global opt-out checkbox on the website, he or she continues to receive requested notifications and acknowledgment emails.

5. Under **Subscriptions**, customize the instructions that appear for the subscriptions section of the User Email Preferences form. In the **Subscribe instructions** field, enter the text to appear for the newsletter subscription checkboxes on the website.
6. To customize additional messages that appear for the part, select the Language tab. For information about the Language tab, see Language Tab on page 10.
7. Click **Save**. You return to *Parts*.

User Interests Form

With the User Interest Form part, you can create a web page that captures a website user's interests. You can download the information that website users select on the User Interests Form. You can use this information to raise funds and create awareness for your organization. For example, if many website users select Wine Tasting on your User Interests Form, you can host a wine-tasting event in your community.

Design User Interests Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Title** field, enter a name to identify the User Interests Form part.

2. In the **Help message** field, enter the message to appear on the website page, such as to provide instructions for site users.
3. Under **Interests to include**, select the interests website users can choose from on the User Interests Form.

4. Click **Save**. You return to *Parts*.

User Login

To control the areas users can access on your website, create a User Login part. When a user logs in, the user login determines the roles that the user belongs to and the features that the user has security rights to access.

There are several important items to remember about the User Login part. Make sure you consider this information when you design the part.

- The part automatically includes sections for the login and logout pages. You can design the part to also include sections for the new user registration page and the forgotten password page.
- You create emails to acknowledge registrations and provide forgotten usernames.
- When you have multiple websites, create multiple login pages to provide access to each site.
- You can enable social media to allow new users to register with their social network login. When you use the social media login option, you can indicate where to display the social media icons on login forms.
- Multiple users can use the same email address when they sign up for your site. This makes it easy for an entire family to sign up for an event. If a family shares an email address and one user forgets a password or username, the reminder email contains all usernames associated with that email address. The password reset link connects to a page where the user can select the username that needs a new password.
- When you include a link to this part in an email message, you can create a special page link to send users to the login page and you can also create a special page link to send users to the forgotten password page. When you include this link in a message and an email recipient clicks the link, a secure page appears with a **Forgotten Password** field for the user to enter their email address. This link remains active in the email for the user to take action to reset the password any time. After the email address is submitted on the web

page, another email sends to the user. That email contains another link that returns the user to the reset password page on your website. For more information about how to create a special page link, refer to the *Program Basics Guide*.

Design User Login

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, when you configure social media for third-party authentication with social networks such as Facebook and Twitter, **Social website login** appears with the **Enable social website login** checkbox. To enable social media options for the login, select the checkbox. Additional options appear.
    a. In the **Sign in text** field, enter the text to display for standard and social network login options.
    b. In the **Social website sign in text** field, enter the text to display above the social site icons.
    c. Under **Display options**, specify where to place the social site icons relative to the standard login fields.

Note: For more information about social media for third-party authentication, refer to the *Administration Guide*.

2. Under **Captions and properties**, select whether to include forms for new registrations or forgotten logins. To include a form, select its checkbox in the **Enabled** column.

Note: To change the caption for a form, select the Language tab. For information about the Language tab, see Language Tab on page 10.

We recommend you clear **New User Registration** if you import records from Blackbaud CRM into the website. Imported users are registered automatically, so they do not need to register a second time with the User Login part. For information about how to import users, see the *Users & Security Guide*.

Note: After you create a login page with the User Login part, select it in the **Member Login Page** field in the **Registration and Login Options** frame on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*.

3. In the **Constituency** field, select a constituency to assign to users who use this form on your website. For more information about constituencies, refer to the *Program Basics Guide*.
4. Under **Navigation**, select the web page to appear after users log in, log out, register, or reset passwords.
    - By default, the Login, Logout, and New user registration forms are set to the default home page you selected on the Settings tab in *Sites & settings*, and the Password reset form is set to blank.
    - To clear the web page selected for a form, click **Remove page** for that form. If you do not select a page for **New user registration**, users are directed to the page selected for the login form. If you do not select a page for **Password reset**, the program does not redirect users to another page. Instead, a message appears to indicate the password is reset.
5. Under **Additional fields**, select the biographical fields to include on the new user registration form.

a. In the **Field** grid, select **Include** for each field to include on the form. To make a field required, select **Required**. When you select **Include** for the **Address block** field, it is automatically required.

b. In the **Attribute** grid, select **Include** for each attribute to include on the form. To make the attributes required, select the checkbox in the **Required** column.

   Blackbaud CRM provides these constituent attributes. To add a new attribute for your part, create it in Blackbaud CRM. For example, you can use a constituent attribute to track t-shirt sizes for participants. To track this information, create a t-shirt size attribute. If you know an attribute exists, but do not see it online, check the Settings tab in *Sites & settings* to verify the attribute is available.

6. Under **Role assignment**, select the checkbox under **Member** for each role to assign to users who sign up through this User Login part.

7. To create a reminder email to send to members who click **Forgotten Password/Username** or **Forgotten Password**, click **Forgotten Password/Username Email** on the action bar. The HTML editor appears. You can use the default text provided or enter different text.

Note: When you include the **Password Reset Link** merge field in the reminder email, the field displays as a secure link that remains active for 24 hours. When a user clicks the link, a secure page appears to enter and confirm a new password..

8. To create an email to send to new users after they register, click **New User Registration Email** on the action bar. The New User Registration Email screen appears. You can use the default text provided or enter different text. Use the merge fields to include the username, password, and other personalization.

   For information about how to create an email, refer to the *Email Guide*.

9. To create instructions to appear on the Login, New User Registration, and Forgot Password screens of the part, select the Helplets tab. For information about this tab, see Helplets Tab on page 12.

10. To customize the messages and labels that appear for the part on your website, select the Language tab. For information about the Language tab, see Language Tab on page 10.

11. Click **Save**. You return to *Parts*.

User Photos Form

To allow website users to upload a picture along with a profile image on a profile web page, include a User Photos Form part on a page that also includes the Profile Display part. When a user uploads an image on the User Photos Form, the image appears along with the profile information for the user. When you include the User Photos Form part on a profile page that links to a Directory part, other website users view the image when they access profiles through the directory.

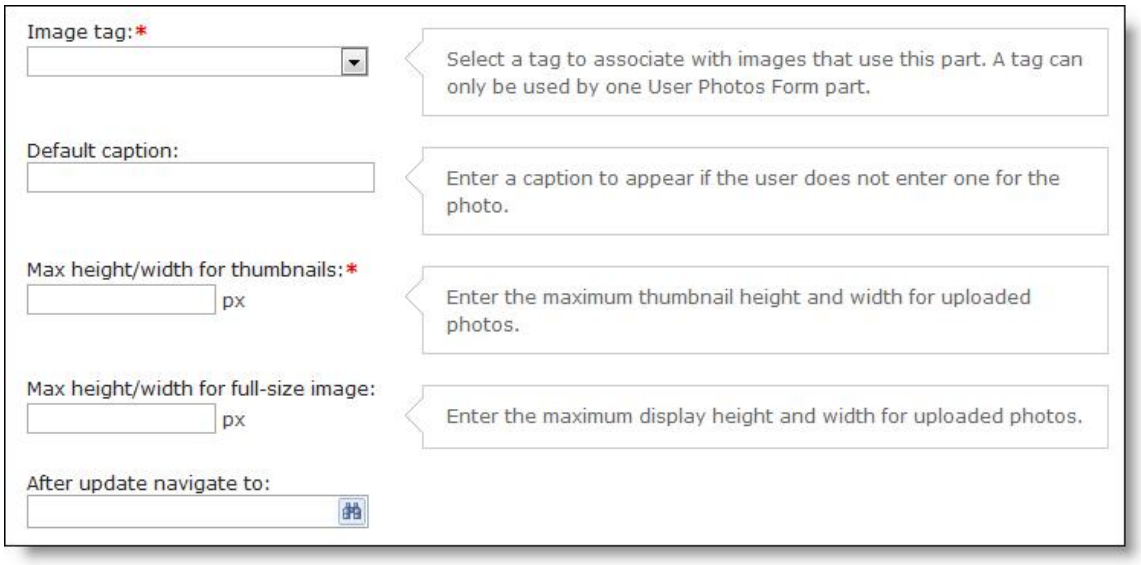
Images must be *.bmp, *.gif, *.ico, *.jpeg, *.jpg, or *.png files.

Tip: On the Settings tab in *Sites & settings*, you can require approval for images. Under **User Image Options**, select **Require approval for all images uploaded by users**. When you include the User Photos Form part on a profile page and users upload images, you must approve the images in *Image library* for it to appear on your website. For more information, see the *Administration Guide*.

Design User Photos Form

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, select the tag in the **Image tag** field to associate with images that users upload through the user photos form. Tags are keywords or phrases to identify an image's content. For more information about tags, see Tags Tab on page 15.



2. In the **Default caption** field, enter the caption to display with images when users do not enter captions.
3. In the **Max height/width for thumbnails** field, enter a size limit for images as thumbnails. By default, images uploaded on this part appear as a thumbnail on the web page.
4. In the **Max height/width for full-size image** field, enter a size limit for how to display images when users click thumbnails. If you leave the field blank, images do not appear when users click thumbnails.
5. In the **After update navigate to** field, browse to the page to direct users to after they select images on this part.
6. Click **Save**. You return to *Parts*.

Weblog

With the Weblog part, you can collect or share information on your website that pertains to your organization. This can range from your organization's news to appeals sent to your alumni to links to other related websites. Given the appropriate rights, your program users and website users can update the Weblog part.

The part creates a RSS feed of posts. Include the part on one of your website pages so users can add and edit posts to appear in the feed. Users can view the feed from the page when they click the RSS icon next to the title of the Weblog, or from an RSS reader. You can add the News Reader part to your website to display the feed, or users can subscribe to the feed with a third party reader.

Note: When users add or edit posts, the program includes content from the **Story Title** and **Story Content** fields in the search results for the Search and Quick Search parts. Also, the program uses content from the **Tags for this story** field to create category information in the RSS feed. Some RSS readers use this information to arrange posts in groups that share common categories.

▸ Design Weblog

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Date format** field, select a date format for the blog.
2. Under **RSS Publishing Properties**, in the **Title** field, enter the title of your weblog, such as "Best Solicitation Practices for Fundraising."

Note: The **Title** field is optional. However, to save a weblog, you must either enter a title or enter description information in the **Description** field.

   a. In the **Description** field, enter any additional information, such as "Check weekly for updates."
   b. In the **Link URL** field, enter your website link that news readers such as *NewsGator* use to link to your site. This link should direct the website user to your weblog or a general information page about your organization.

      To view the information you enter in this field, click **XML** for the weblog on your site. For the example, the XML information for your description reads "<description>Check often for weekly updates</description>." In addition, news readers use the weblog description information to provide general information about the contents of the weblog. For more information about the News Reader part, see News Reader on page 89.
   c. In the **Copyright** field, enter a copyright notice for your weblog, if you have one.

   d. In the **Editor's Email** field, enter your email address or the person who is responsible for the content of your weblog.
   e. To approve weblog posts before they appear on your site, select **Moderated**.
3. Under **Image Properties**, click **Select Image**. The Select Image From Image Library screen appears. For information about how to insert an image, see the *Program Basics Guide*.
4. To share valuable information from another website with your site users, in the **Link URL** field, enter the address of the website to link to the weblog.
5. Under **Security Rights**, specify the roles with post and manage rights for the weblog.
   a. In the **Post** column, select the checkbox to assign post rights to users and roles. This does not grant rights to edit or delete postings.
   b. In the **Manage** column, select the checkbox to assign manage rights to users and roles. This grants rights to add, edit, and delete postings. If **Moderated** is selected, these users and roles can approve postings.
   c. To include additional users and roles, select **Add users and roles**.
6. Click **Save**. You return to *Parts*.

Web Traffic Reports

Using the Report (Web Traffic) part, you can create reports with statistics about your website's traffic.

Warning: To create a Web Traffic report, you must run Microsoft *SQL Server Agent*. If you are unsure whether you run this program, consult your system administrator.

You can add several types of Web Traffic reports:

Site Usage Report — The Site Usage Report displays the total number of hits each page on your website received and the percentage of total hits compared to other pages on your site. Web pages are hyperlinked so you can open them directly from the report.

Page Rank Report — The Page Rank Report is a small bar graph that displays the number of hits a page received and its overall rank compared to other pages on your website. You can place this graph on any page. We recommend you grant view rights to only to those who need to see the statistics.

Page View Summary — The Page View Summary displays the total number of page views, the average number of page views, and the average number of page views per visit for all pages in the website. Website users can filter the report results by date range and group the results displayed in the bar graph by day, week, or month.

Page Overview Report — The Page Overview Report displays the total number of page visits and views for each page viewed. It also includes a bar graph that displays the total number of page visits and views for each page ID. You can filter the report so it includes only pages with the top 10 number of views or visitors, the bottom 10 number of views or visitors, or all pages that had views or visitors. Web pages are hyperlinked so you can open them directly from the report.

Visit Summary — The Visit Summary displays statistics for website visits during the specified period of time. The summary includes the total number of visits and average number of visits per day. It also includes the total length of time visitors spent on the website and the average visit length per visitor. To calculate the average visit length, the program divides the total length of time of all the visits by the total number of sessions (individual visits).

Visitor Summary — The Visitor Summary displays statistics including the total number of website visitors, the number of unique visitors, the number of one-time visitors, the number of repeat visitors, and the average

number of visits per visitor. The summary also includes the total number of program visitors and the number of unique program visitors. Website users can filter the report results by date range.

Note: In the Visit Statistics section, Total Visits is the total number of users (everyone who accessed the website, logged-in or not.) In the Blackbaud Internet Solutions Users section, Total Visits is the total number of logged-in users that visited the website. For example, here are the Visitor Summary results for a website:

Visit Statistics

- Total Visits: 13,301

- Unique Visitors: 13,265

- Average Visits per Visitor: 1.00

- One Page Visits: 12,941

Blackbaud Internet Solutions Users

- Total Visits: 72

- Unique Users: 36

- Average Visits per User: 2.00

What this means — The website was viewed 13,301 times by 13,265 unique visitors. 36 views were from visitors who had previously viewed the website during this period.

Of those 13,265 unique visitors, 36 of them logged into the website a total of 72 times among them.

Web Traffic Reporting Terms

This table explains the items included in Web Traffic reports.

Hits	Number of times a page was accessed
Views	Number of times visitors viewed a page
Visits	Number of times users logged into the website
Unique visitors	Number of logged-in users and anonymous visitors (those not logged into the website) who visited the website. These are counted only once, even if they visit multiple times during the report's date range.
Return Visitors	Number of unique users who visited the website more than once while logged in. (This excludes return visits by those not logged in.)
Only Visited once	Number of logged-in users and anonymous visitors (those not logged into the website) who visited the website only once
Unique Hosts	Number of different IP addresses that accessed the website
Unique Users	Number of different logged-in users that accessed the website

Design Web Traffic Report

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see Create and Edit Parts on page 3.

1. From the Design tab, in the **Report Type** field, select the type of report to create.

   To view a pop-up preview of the report, click on the report type. For information about report types, see the introduction to Web Traffic Reports on page 185.

2. In the **Report Title** field, select the report title.
   - To use the report name as the title, select **Default**.

- To use a custom title, select **Other** and enter the report title in the field.

3. To display the name of the report, select **Show Report Title**.
4. Click **Save**. You return to *Parts*.