

General Features Guide

11/01/2017 Blackbaud Altru 4.98 General Features US

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GeneralFeatures-2016

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The application provides many features to help you navigate through, access, and share your information. This guide explains various navigation tools in the application and how to use features such as the home page and favorites.

User Forum

Throughout the program, the **Community-powered support** task provides access to the **Altru** user forum where you can connect with other users to get help, share solutions, and discuss ideas for the program. From the forum, you can also access additional resources such as blogs and training videos.

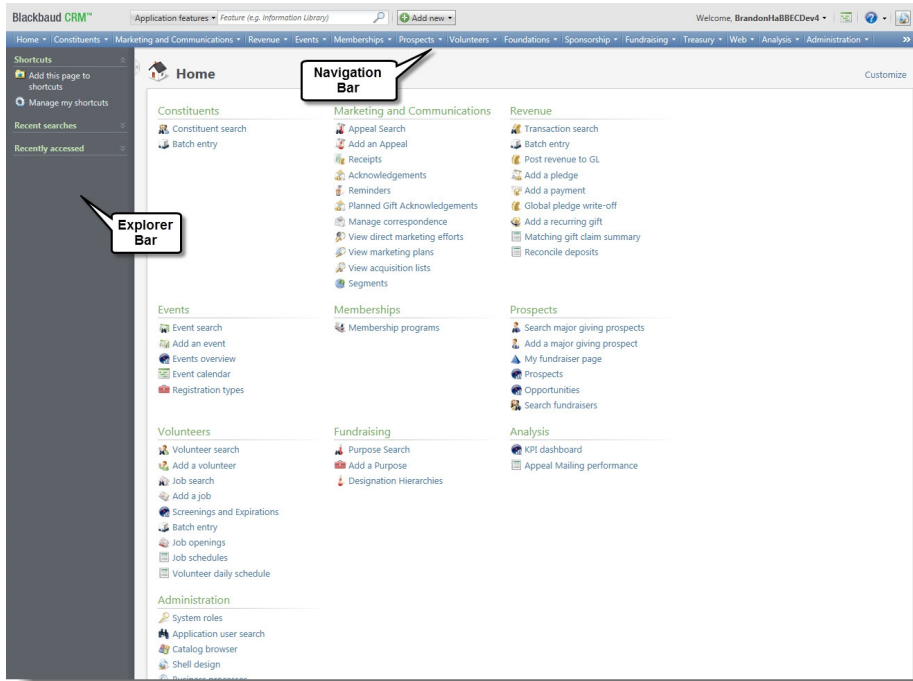
General Navigation

The application includes a variety of navigation features that give you increased control over the software.

Navigation and Explorer Bars

Pages in the application include the following features:

- **Navigation bar:** The navigation bar allows you to navigate through the application and return to your home page. Your role in the application determines the appearance of the navigation bar, and it only displays features that you have permission to access.
- **Explorer bar:** From the explorer bar, you can quickly access recently performed searches, recently viewed records and pages, and shortcuts. Based on the current page, you can also access related tasks and activities.

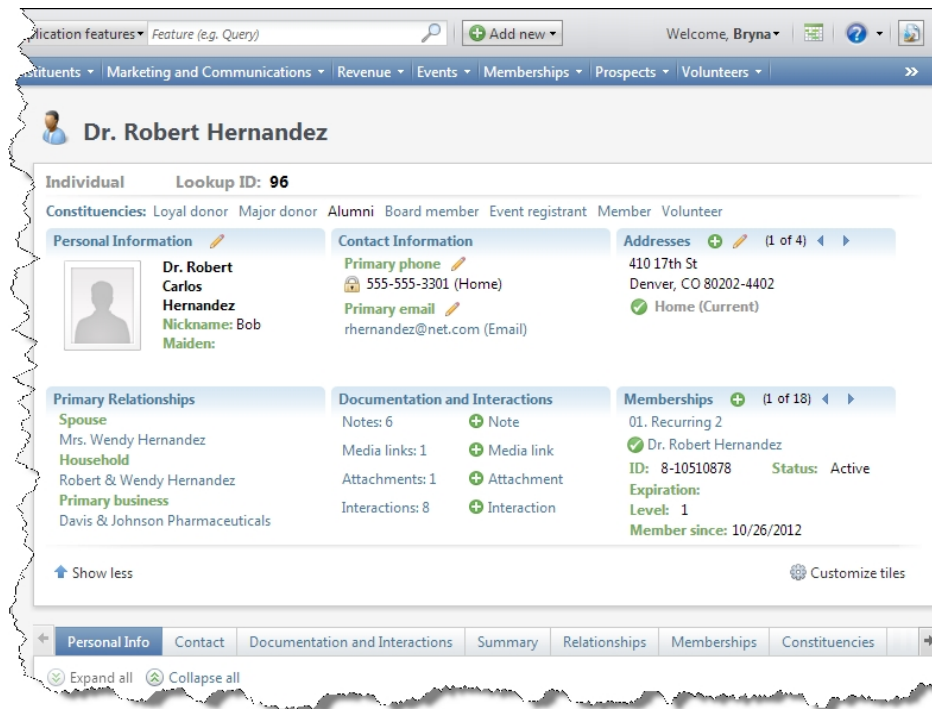


Summary Tiles

Some pages in the application include summary tiles. Summary tiles allow you to quickly view, add, and edit information. Tiles often link to other pages and tabs. You can use these links as shortcuts to navigate throughout the program.

For some pages, each application user can customize which tiles are visible. You can also change the order in which they display.

Tiles respect security settings. If you do not have permission to access the information that a tile links to or displays, that information does not appear.



Shortcuts for My Profile

On the My Profile page, you can use the **Shortcuts** feature to create shortcuts to pages and records that you access frequently. You can specify pages as shortcuts to access them from the **Shortcuts** menu on the explorer bar.

You can also organize, rename, and delete shortcuts and email shortcut links.

➤ Add a shortcut

1. Open the location you want to save as a shortcut.
2. On the explorer bar, click **Add this page to shortcuts**.

Or

1. Under **Shortcuts**, click **Manage my shortcuts**. The My Profile page displays.
2. Click **Add a task**. The Add tasks to shortcuts screen displays. All functional areas in the application containing tasks to which you can create a shortcut display in the **Functional area** box.
3. Select the functional area that contains the task(s) to which you want to link. All tasks display in the **Task** box.
4. Select all tasks to which you want to create a shortcut.
5. Click **Save**.
6. Once a shortcut has been added, you can rename, delete, move, or email a link to the shortcut.

Select the shortcut you wish to modify:

- Select **Rename** to modify the name of the shortcut. Enter the desired name and click **Save** to rename the shortcut.
- Select **Delete** and press **Yes** to delete the shortcut.
- Select **Email link** to generate an email message that includes a link.
- Select **Move to top**, **Move up**, **Move down**, or **Move to bottom** to move the link to the desired location.

Home Page

The Home page appears when you start the application. To return to it, click **Home** on the navigation bar. You can add any page in the program to your shortcuts for ease of navigation. This can be useful if you work primarily in one area of the application or want a certain page to be easy to access. From any page you want to add to your shortcuts, click **Add this page to shortcuts** on the left navigation.

Application-Level Search

The application-level search function helps you find a specific feature in the application when you do not know its location. The search field available at the top of any application page accesses a search engine. Based on the search option you select, the engine searches the program and returns links to all pages, tasks, RSS feeds, and help documentation that satisfy the search criteria. The search engine also overlooks minor spelling errors and respects system security.

Feature Search

A feature search is a quick navigational tool that searches all areas of the application — pages, tasks, RSS feeds — for information that satisfies your search criteria. It is the most general of the search options and likely generates the most results.

For example, if you enter “add constituent” in the **search** field, the Search Results page displays links to areas in the program that match the words “add” and “constituent.” On the Search Results page, if you click a task link such as **Add an individual**, the task is invoked and the Add an individual screen appears for you to enter a new constituent. If you click a page link such as **Constituent Giving Information**, a search screen appears and you can search for the constituent whose information you want to view.

To execute a feature-level search, click **Application features** beside the search field and select the feature to search. Enter your criteria in the search field and click the magnifying glass. The results appear on the Search Results page.

Context-Based Feature Search

In the search field, you can include context information and refine your feature search. For example, to locate Robert Hernandez’s constituent record, rather than search for just “constituent record,” you can

include the constituent name: "constituent info?rob hernandez." In the search results, you can click links to various constituent areas in the program with information about Robert Hernandez. When you click a link, constituent information appears or a search screen appears with a list of matching records.

In the search field, you can also call up and display ad-hoc and smart query results. For example, if you have an "Ohio Constituents" ad-hoc query, you can enter "query?Ohio Constituents" in the search field. When you click **Ad-hoc Query Results** in the search results, the Ad-hoc Query page appears for the "Ohio Constituents" query. From this page, you can browse records, edit the query definition, create an export, create tasks, and assign permissions.

Note: For information about **Query**, refer to the Query chapter in the *Query and Export Guide*.

RSS Feed Search

RSS feeds in the program are included by default in feature-level searches. However, you can search for RSS feeds only. This limits the number of results and provides a way to view RSS feeds available.

To restrict your search to RSS feeds, click **Application features** and select **RSS feeds**. Enter your search criteria in the **Find** field and click **Search**. Only RSS feeds that match your search criteria appear on the Search Results page.

Click an RSS feed to access the feed page in the program. From this page, you can review feed data and subscribe to the feed.

Quick Find Search

With the quick find functionality, you can search for and open specific records in the application.

For example, if you click **Application features** and select **Appeals**, you can enter "Fall Mailing" in the search field to search for the fall mailing appeal record. If a single record matches your criteria, the record opens. If multiple records match your criteria, a search screen appears with a list of matching records. You can refine your criteria and execute a new search to locate the desired record.

Configure Search

Although the search function includes some items by default, you can edit the search list and expand this number.

Edit Search Lists

When a feature search returns a feature that requires context, the search page must be able to resolve the context. Context on a feature is always tied to a specific record type, as are search lists; however, each record type can have multiple search lists associated with it. For these records types, you must manually map to the search list to use. For example, the batch record type includes three search lists: batch template search, batch search, and batch type search. With the **Default search list** configuration option in *Administration*, you can select the list to use in your searches.

➤ Select search lists for record types

1. From *Administration*, under **Configuration** click **Default search lists**. The Default Search Lists page appears. This page displays a list of record types mapped to related search lists.

Record type	Default search list
Account	Account Search
Acknowledgement Process	Acknowledgement Process Search
Address	Batch Address Search
Ad-hoc Query	Ad-hoc Query Search
Alert Type	Alert Type Search
Appeal	Appeal Search
Application User	Application User Search
Auction Item	Auction item search
AuctionMaestro Pro Import Batch...	AuctionMaestro Pro Import Auction Item Search
Bank	Non-Bank Search
Bank Account	Bank Account Search
Bank Account Deposit	Deposit Search
Batch	Batch Type Search
Benefit	Benefit Search
Business Process	Business Process Search
Campaign	Campaign Search
Code Table	Code Table Search
Composite Segment Mapping	Composite Segment Mapping Search List

2. Click **Edit**. The Define the default search list for system record types screen appears.

Record type	Default search list
Acknowledgement Process	Acknowledgement Process Search
Address	Batch Address Search
Ad-hoc Query	Ad-hoc Query Search
Alert Type	Alert Type Search
Appeal	Appeal Search
Application User	Application User Search
Auction Item	Auction item search
Bank	Non-Bank Search
Bank Account	Bank Account Search
Bank Account Deposit	Deposit Search

Note: only record types that have at least one page defined and also have a search list that supports quick find are displayed.

Help Save Cancel

3. On the **Default search list** column, select the list to use for the record type.
4. Click **Save**. You return to the Default Search Lists page. Your changes appear in the grid.

Add New

If you want to quickly add a new item to the system, you can use the **Add new** button next to the search field. A list of the most commonly added items will display. Select an option to display the add screen for that item.

Rearrange Tabs

You can now drag and drop tabs and subtabs into any order you prefer. This is a sticky setting, so it is saved the next time you access any record of the same type. This allows you to organize the tabs in the order that makes sense for your workflow. Any record that uses tabs, such as Constituents, Revenue, Events, and so on, can use this feature.

Note: There is no way to reset the tabs to their default setting once they have been moved. They must be moved manually in order to reset them to the default.

Calendars

Various calendars are used throughout the application to provide a view of scheduled items related to your organization or community. These can include upcoming events, mailings, holidays, or other items related to the specific calendar currently open. In addition to an effective view of scheduled items, many calendars provide tools to add and edit items directly from the calendar, which can save you time.

Although the calendars displayed throughout the application may have different purposes, they each have several common components to help you more effectively view and interact with information. For example, filters provide a way to narrow or expand the items displayed on the calendar and color-coding helps you identify items.

To help customize calendars for how you work, you can change the colors used to identify specific items on the calendar. To change the colors defined for each item that appears on the calendar, click **Customize style**. In the grid, within the **Style** column, click the down arrow and select a color to assign to each. Click **OK** to save.

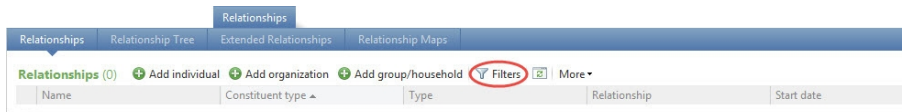
Refresh a Page

When you work in the application, you might encounter a situation where a record is changed by another user while you view it. If this happens, the information on the page might be inaccurate. You can refresh the page to display the most current information in the database.

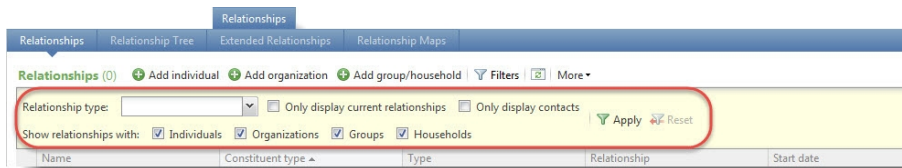
Filters

The **Filter** button allows you to customize entries in data lists. You can use the **Filter** button to select record types to display in a list or to select a date range. The filter options that appear depend on the type of data in the list.

For some data lists, the filter options always appear above the lists. For other data lists, you must click **Filter** to open the filter options.



The filter options that appear depend on the data list.



When you apply filters to a list of items, the application remembers your filter settings and uses them as defaults the next time you view the list. For example, if you typically are only interested in the most recent transactions on a constituent's revenue history, you can apply a date range filter of "Last week." When you go to any constituent record and view the revenue history, it uses the default filter and displays only transactions that took place in the last week. If you apply a date range filter of "Last quarter," the next time you view the revenue history, it displays transactions from the last quarter.

Filter settings are stored for each user, so a user's defaults do not impact anyone else. Filter settings are also stored across sessions, so you can log out and log back in and still see your defaults.

Note: There are also filters on some dashboards and reports; however, these settings are not stored and must be reapplied each time you access the dashboard or report.

You can also sort the information that appears in a datalist by clicking on a column heading. For example, you can click on a **Date** column heading and items will be listed in chronological order. Sort options are not stored and must be reapplied each time you access the datalist.

Really Simple Syndication (RSS)

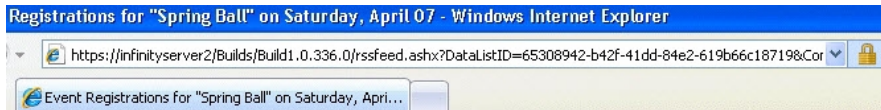
You can use the program to publish lists of data, such as registrations for an event, as Really Simple Syndication (RSS) feeds. RSS is a simple XML-based system that lets users subscribe to content such as news or website updates and then aggregate it into a single location using RSS-aware software. With this feature you can target important information to members of your organization. Users who subscribe to the RSS feed can view the information as it is updated in the program. For example, an RSS feed can supply the person responsible for a special event with up-to-date registration information.

➤ Use the RSS feature

1. Locate a data list that has been RSS-enabled in the application. The **View RSS feed** icon denotes a data list that can be subscribed to as a feed.

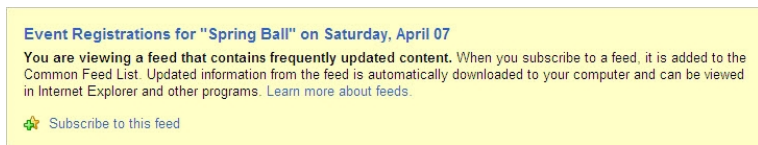


2. Click **View RSS feed**. A link to the feed opens in your default web browser.



Note: The link to the RSS feed is in the form of a text-based URL. For example, `https://<SERVER NAME>/<SERVER PATH>/<RSS FEED LINK>`.

3. If the web browser supports RSS, it can give you the option to subscribe to the feed.

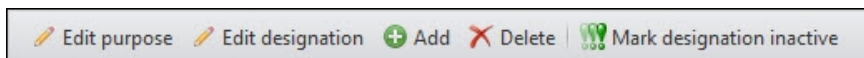


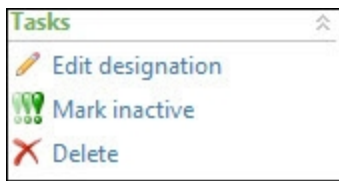
4. You can use the browser's built-in functionality to subscribe to the feed, or you can copy and paste the link to the RSS feed into a preferred software or service. The method used to view the feed determines how it looks.
5. The link to the RSS feed can also be shared with other users. You can send the URL and they can view the feed with an RSS-enabled software or service. As the information is updated in the program, the information in the related RSS feed is visible to all subscribers.

Mark Data as Inactive

When you delete information from the database, you cannot recover that data. As an alternative, you can mark data such as constituent records or membership program levels as inactive. This allows you to retain the information in the database but exclude it by default from lists, search results, queries, and reports.

To mark data as inactive, you select it in the grid and either click **Mark inactive** in the action bar or under **Tasks** in the explorer bar. You can use filter options in the program to include inactive data in lists, search results, queries, and reports.

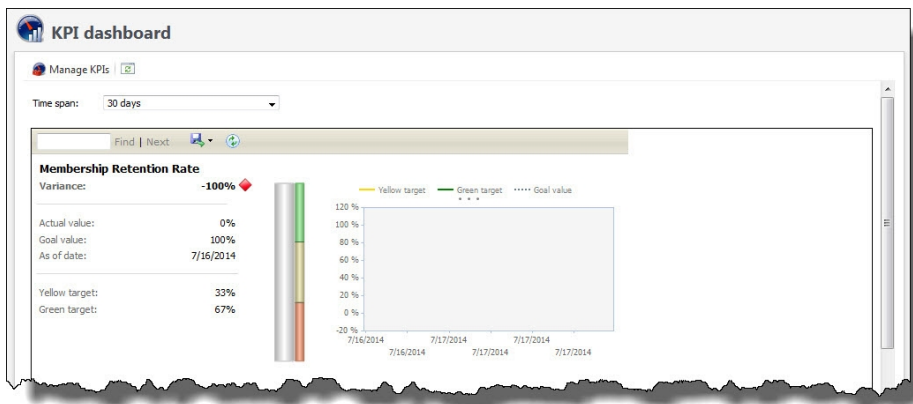




To restore inactive data, you select it in the grid and either click **Mark active** in the action bar or under **Tasks** in the explorer bar.

KPI Dashboard

All users have a personal dashboard, displaying key performance indicator (KPI) data. The dashboard includes data from every KPI instance that the user has permissions to.

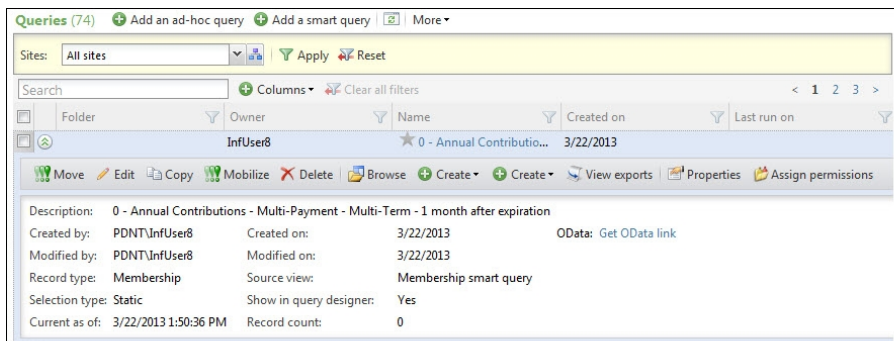


The KPI dashboard stores all KPI values and statistics in an easy to view format. You can modify the **Time span** to make it easier to access the information you need. You can also export the information to Microsoft *Excel* or Microsoft *Word* or generate a PDF.

For more information about KPIs, refer to the *Reports and KPIs Guide*.

Lists

There are two types of lists in the program: data lists and list builder lists. List builder lists include more advanced options for sorting and navigating the data on the list.



The following features are available in data lists and list builder lists.

- To sort the grid data by a specific column, click the column header. The column is sorted in ascending order. Click the column header again to sort in descending order.
- To auto-size list columns, click **More, Autosize all columns**. The columns will adjust to fit the largest piece of data contained within each column.
- To revert back to the grid defaults, click **More, Restore grid defaults**.

Tip:

After you make desired list changes, we recommend you save your list for future access. You can save as many lists as you need to segment and review data.

You can also complete tasks for records on the list. To access task buttons, click the double arrows next to a record to expand the row. Expanded rows may also include additional information about the record.


After you create a list, you can download the information for future reference. You can download a list as a comma-separated values (.CSV) file or a Microsoft *Excel* (.XLSX) spreadsheet. For example, you can download a .CSV file of addresses to provide to a mail house, or export an *Excel* spreadsheet for use outside of the program.

- To download a list, click **More** and then click **Download to CSV** or **Download to XLSX**.
- To save a list, click **Save list**. In the Save list screen, enter a name and description to identify the list and click **Save**.
- To open a saved list, click **Open list**. In the Open a list screen, click the name of the list. To narrow down the lists that appear, search for a list by its name.

Note: Saved lists are visible to any user that has access to that data list. However, saved lists do respect data security permissions.

Note: Not all lists currently support the save and open list features.

These features are exclusive to list builder lists:

- To filter data in a column, click the filter  icon.
Enter your filter criteria based on the data in the column. For example, for a date-based column, you can enter date criteria, such as all donations after 11/1/2012. For name-based columns, you

can enter the name by which you want to filter, such as all registrants with the last name Williams.

- You can search for specific list items in the **Search** field. The program uses your criteria but only searches through the first 500 records that display for the list. Before you use the search, we recommend you use the column filters to narrow down the results.
- To select which columns to display, click **Columns** and select which columns to show and hide. Use the **Search** field to quickly find a column by name.
- To reorganize columns in the grid, drag and drop a column header.
- Columns and filters are sticky by user.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

➤ Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.

Screen Item Description

Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click Choose file . To view an attachment, click Open file . To remove an attachment, click Clear file .

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

> Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

> Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

> Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

> Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

> Delete a media link

1. Go to the Documentation tab of a record.

2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

> Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

> Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

> Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Revenue records

Notifications appear on the information bar of a record.

The screenshot shows a constituent record for Robert Hernandez. At the top, there is a notification bar with the text: "Notifications: 'Board member'. Click here for more information." Below this, the record is categorized as "Individual" with a "Lookup ID: 8-10024918". The "Constituencies" section lists "Friend", "Major donor", and "Event registrant". The record is divided into several tabs: "Personal Information", "Contact Information", "Addresses", "Primary Relationships", "Documentation and Interactions", and "Memberships".

Personal Information	Contact Information	Addresses
<p>Robert Hernandez</p> <p>Nickname: Robert</p> <p>Maiden:</p>	<p>Primary phone</p> <p>+1 843-312-2991 (Home)</p> <p>Primary email</p> <p>+ Primary email</p>	<p>1003 Cedar St</p> <p>Elizabeth City, NC 27909-3701</p> <p>(Current)</p>

Primary Relationships	Documentation and Interactions	Memberships
<p>Spouse</p> <p>+ Spouse</p> <p>Household</p> <p>+ Add to household</p> <p>Primary business</p>	<p>Notes: 1 + Note</p> <p>Media links: 0 + Media link</p> <p>Attachments: 0 + Attachment</p> <p>Interactions: 3 + Interaction</p>	<p>ID: Status:</p> <p>Expiration:</p> <p>Level:</p> <p>Member since:</p>

Note: Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

Add Notifications to Specific Records

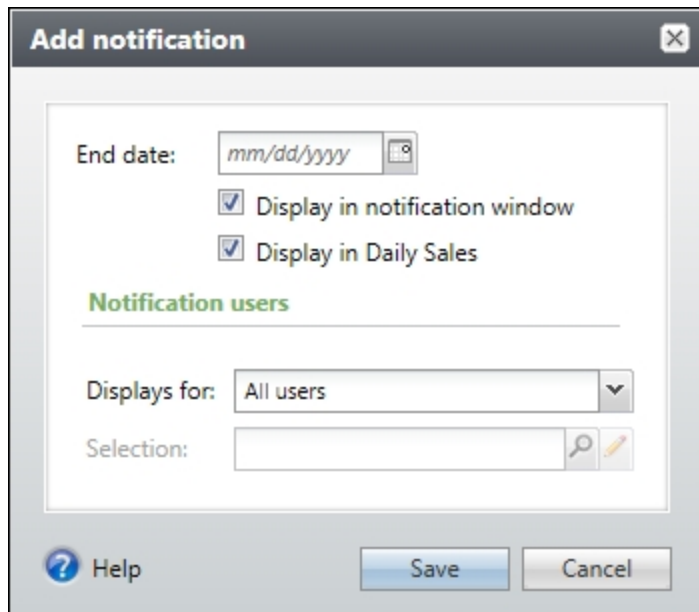
On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

➤ Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.



The screenshot shows a dialog box titled "Add notification". It contains the following elements:

- End date:** A text input field with the placeholder "mm/dd/yyyy" and a calendar icon to its right.
- Display in notification window**
- Display in Daily Sales**
- Notification users** (Section header)
- Displays for:** A dropdown menu currently showing "All users".
- Selection:** A text input field with a magnifying glass icon and an edit icon to its right.
- At the bottom: A "Help" button with a question mark icon, and "Save" and "Cancel" buttons.

4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Select how long to display the notification, whether to display it in a notification window and in Daily Sales, and the users who view the notification.

Note: When you select **Display in Daily Sales**, we recommend you avoid smart queries and complex query criteria for notifications because it could cause a degradation in performance.

6. Click **Save**. You return to the Documentation tab.

Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

> Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

Note: To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

Reports Toolbar

When you generate a report, you can use the report toolbar to modify how you view the report. The toolbar buttons are common to all reports.

Toolbar item	Description
First Page	On a report with multiple pages, click this button to return to the first page.
Previous Page	On a report with multiple pages, click this button to return to the previous page.
Current Page	The chronological number of the selected page appears. To navigate to a specific page, enter the page number and press ENTER .

Toolbar item	Description
Next Page	On a report with multiple pages, click this button to return to the previous page.
Last Page	On a report with multiple pages, click this button to go to the last page.
Refresh	To refresh information to include new or updated data, click this button.
Export	To select a file format for exporting, click this button. File types include XML file with report data, CSV (comma delimited), TIFF file, pdf file, Web archive, <i>Excel</i> , and <i>Word</i> . Note: In exported reports, such as PDF versions of the reports, some items may appear as links. These currently direct you to the Blackbaud website, instead of to the specific records in the program.
Search Text	To search the report for a word or phrase, enter the text in this field and click Find.
Find	To search for text entered in the Search Text field, click this button.
Next	To search for the next instance of text in the Search Text field, click this button.