

New Features Guide

07/15/2015 Blackbaud Altru 4.4 New Features US

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NewFeatures-2015

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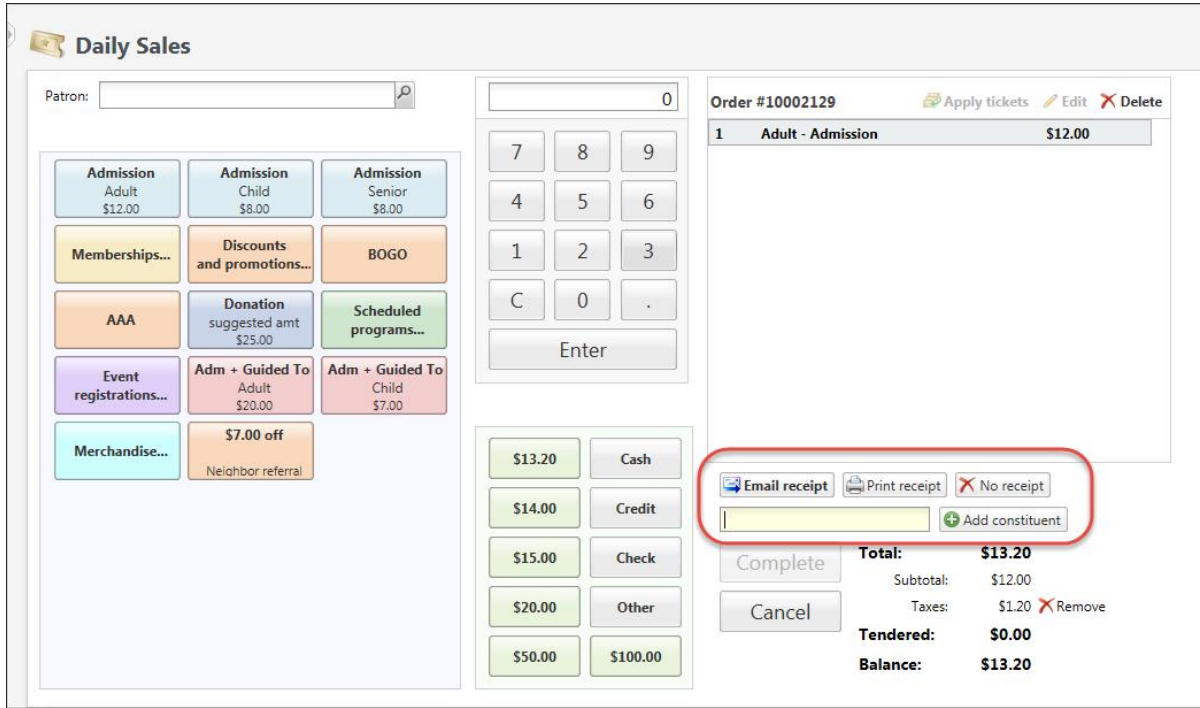
Before you use the new **Blackbaud Altru** features released in August 2015, we recommend that you review the information in this guide. It will help you and any other **Altru** users in your organization get the most from the enhancements we introduced.

Email Itemized Receipts From Daily Sales

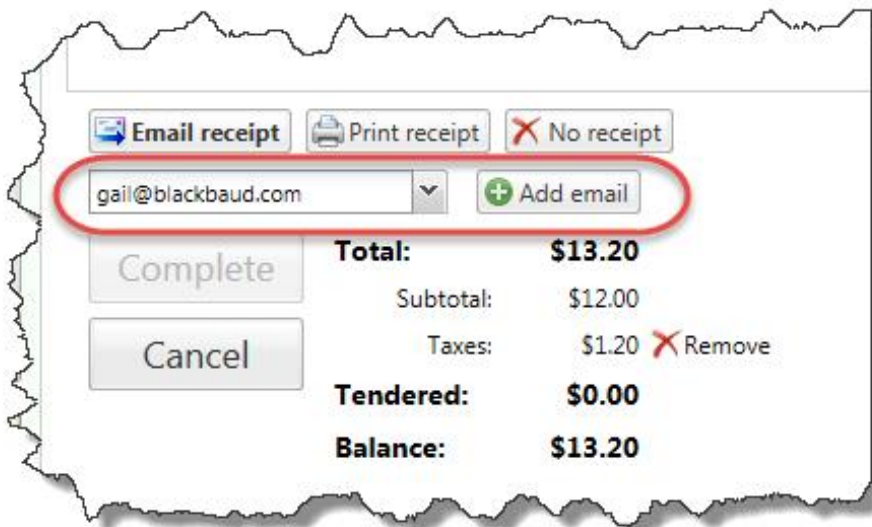
In 4.4, we added the ability to email itemized receipts from Daily Sales. New options on the Daily Sales page allow ticket sellers to choose how to print the itemized receipt. Depending on your configuration, ticket sellers can print, email, or provide no receipt. For example, you can ask patrons their receipt preference and if they decline a printed or emailed receipt, you can click the **No receipt** button. This option saves paper and moves patrons through the line more quickly.

During configuration, you can choose which printing options to make available on the Daily Sales page and which option is selected by default for each delivery method. For more information about configuration, see [Configure Itemized Receipt Printing Options for Daily Sales](#) on page 3.

The new **Email** field appears on the Daily Sales page regardless of which printing option is selected. You can use this field to collect email addresses for marketing purposes. Addresses entered in this field are saved to the sales order record.



If the patron is a constituent, his or her email addresses appear automatically in the email field and you can select which address to use for the receipt. You cannot update a constituent's existing email address from the Daily Sales page, but you can enter a new email address that is saved to the constituent record and sales order. Click **Add email** to access the Add an email address screen. This screen is the same one accessed from the Contact tab of the constituent record.



Configure Itemized Receipt Printing Options for Daily Sales

Warning: You may notice receipt configuration options also appear for the Advance Sales sales method, however they are not functional in this release. You cannot email receipts for advance sales and no receipt options appear on the Advance Sales page. This functionality for Advance Sales will be provided in a future release.

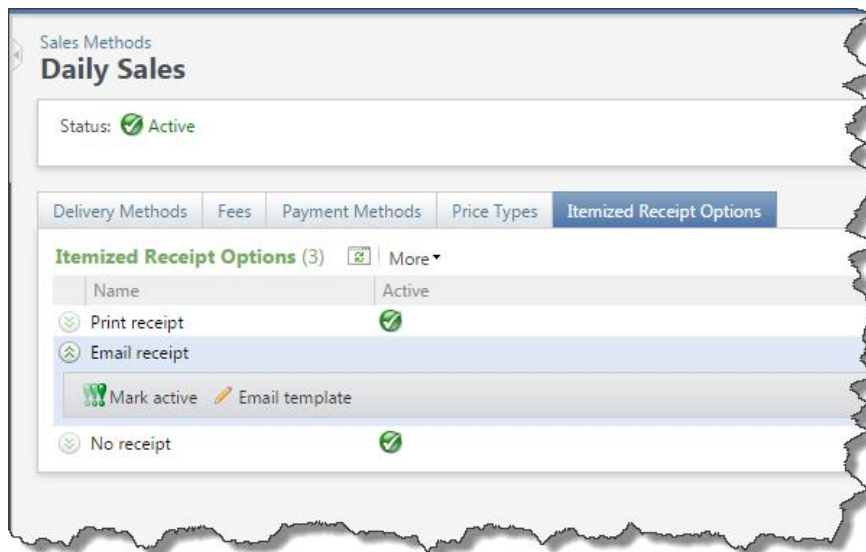
Before you can email itemized receipts, you must configure Itemized Receipt Printing Options. From the Sales Document Templates page in *Tickets*, click the new **Daily sales method options** link found under **Setup**. This shortcut also appears on the Configure Daily Sales page under **Configuration**.

Priority	Name
1	Default Credit name
2	

Select the new Itemized Receipt Options tab to choose which printing options to make available on the Daily Sales page. To make a printing option available, expand the row and click **Mark active**. A green checkmark appears in the **Active** column for each option you make active. **Print receipt** is marked active by default, but ticket sellers can also email a receipt or provide no receipt.

You can also specify which receipt option to use as the default for each delivery method. For example, if you make email the default method for all in person sales, the **Email Receipt** option will be selected by default on the Daily Sales page. However, if the patron asks for a printed receipt, you can select the **Print receipt** button instead, if the print option is active. For more information, see Default Printing Options for Delivery Methods on page 6.

Note: To disable a receipt option, expand the row and click **Mark inactive**. You cannot mark an option inactive if it is set as the default for a delivery method.



For emailed receipts, you must also configure the email template. The template includes a customizable introduction and closing, and details about the order such as the order number, receipt date, items, prices, discounts, and total. You must enter a **Subject**, **From address**, and **From name** for the email.

Receipt email

Subject:

From address: From name:

Email opening

Font Family | 3 (12pt) | **B** *I* U | | | |

Thank you for your purchase or contribution.

Your order information appears below. If you have any additional questions, please contact us.

Order details such as order number, receipt date, items, prices, discounts, and total will be inserted here when the email is sent.

Email closing

Font Family | 3 (12pt) | **B** *I* U | | | |

Please retain this receipt for your records.

Save Cancel

This is an example of an email receipt using the default opening and closing text.

From: Altru3 [<mailto:Altru3@blackbaud.com>]
Sent: Friday, June 19, 2015 8:51 AM
To: Paul Beachy
Subject: Thank you

Thank you for your purchase or contribution.

Your order information appears below. If you have any additional questions, please contact us.

Order #: 10000132	Date: 6/19/2015 8:49 AM
Item	Price
Admission	
2 Adult @ 10.00	\$20.00
AAA \$1 off tickets	(\$2.00)
2 Child @ 5.00	\$10.00
AAA \$1 off tickets	(\$2.00)
Camp fun	
Admission	
Scheduled program 1 (06/19/2015 - 6:00 PM)	
1 Child @ 2.00	\$2.00
1 Adult @ 4.00	\$4.00
Multiple Term membership	
1 Individual @ 10.00	\$10.00
1 Plus One @ 2.00	\$2.00
10% off membership price	(\$1.00)
Discounts	
Adjustable discount	(\$3.20)
	Total
	\$41.80
	Paid Cash
	\$41.80

Please retain this receipt for your records.

Default Printing Options for Delivery Methods

You can also specify which receipt option to use as the default for each delivery method. For example, if you make email the default method for all in person sales, the **Email Receipt** option will be selected by default on the Daily Sales page. Buttons also appear on the Daily Sales page for all other receipt options you make active on the Itemized Receipt Options tab. If the patron asks for a printed receipt, you can select the **Print receipt** button instead.

On the Add a delivery method screen, you can select which printing option to use as the default.

Add a delivery method

Delivery method:

Set as default delivery method

Receipt default:

Help Save Cancel

If you need to change the default, click **Edit receipt default**.

Sales Methods

Daily Sales

Status: ✔ Active

Delivery Methods Fees Payment Methods Price Types Itemized Receipt Options

Delivery methods (1) + Add ▼ Filters E More ▼

Delivery method	Default	Active	Receipt default
✔ In person	✔	Yes	Print receipt

Remove ✔ Set as default ✎ Edit receipt default

Note: Using the default printing rules set on the template, itemized receipts do not print when you process payments with a zero balance due. With printing disabled, no receipt will print when a ticket seller clicks **Print receipt** on the Daily Sales page for an order with a zero balance due. However, when the default printing option for Daily Sales is set to email, a receipt is always emailed even for zero balances.

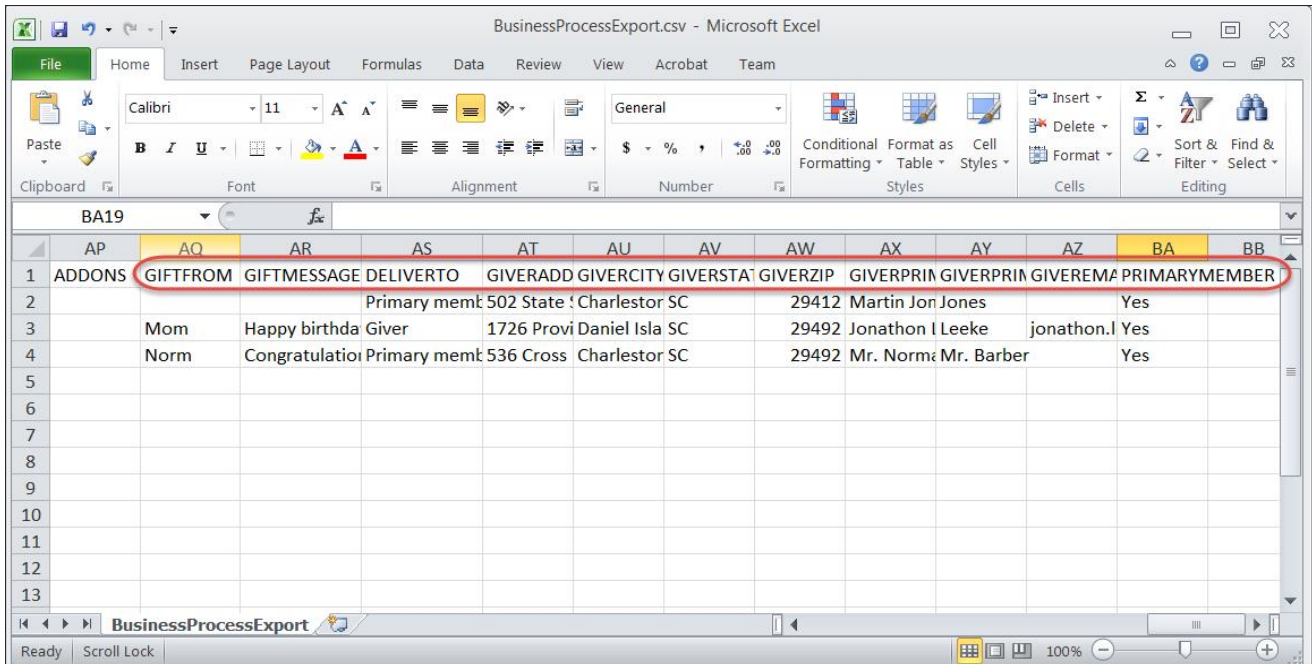
Gift Fields for Membership Card Letters

In version 4.3, we added the [ability to purchase membership gifts online](#). Purchasers can enter the recipient's information on the membership web form and specify whether to deliver the membership cards and future renewal notices to themselves or to the recipients. They can also enter a friendly name (such as Granny or the Burns Family) and a gift message.

To further enhance this feature, we added merge fields so you can include the gift giver’s name and their message in a personalized membership letter to the gift recipient. We also added fields for the giver’s address and delivery preference so you can segment and mail letters based on where the giver wants them sent. Lastly, a new merge field is available for primary members to help you further refine your membership letters and cards.

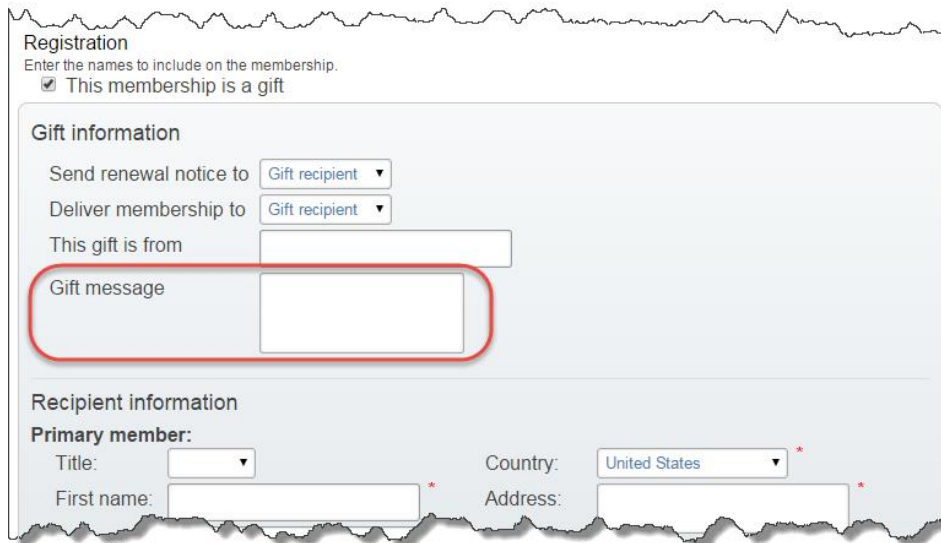
These fields are available for the header file and letter template, and in the standard Membership Card output you export to a .CSV file:

- GiftFrom
- GiftMessage
- DeliverTo
- GiverAddress
- GiverCity
- GiverState
- GiverZip
- GiverPrimaryAddressee
- GiverPrimarySalutation
- GiverEmailAddress
- PrimaryMember



Hide the Gift Message Field on Membership Web Forms

The **Gift message** field on the membership web form is now optional. If you don't plan to include the personalized gift message in membership letters, you can hide the **Gift message** field from the membership form.



The image shows a screenshot of a membership registration form. The form is titled "Registration" and includes a checkbox for "This membership is a gift" which is checked. Below this, there is a section titled "Gift information" containing several fields: "Send renewal notice to" and "Deliver membership to" (both dropdown menus set to "Gift recipient"), "This gift is from" (text input), and "Gift message" (text input). The "Gift message" field is highlighted with a red rounded rectangle. Below the "Gift information" section is the "Recipient information" section, which includes a "Primary member:" label and fields for "Title", "Country" (set to "United States"), "First name", and "Address".

From the Manage Membership Forms page, click the down arrows to expand the membership web form and click **Options**. On the options screen, clear the checkbox next to **Gift Message**.

Note: If you leave **Gift message** selected, you can also make it required. (In the previous version, it was always included on the form but not required.)

Blackbaud Internet Solutions - Blank Client Site - Google Chrome

ptlr37.pdnt.blackbaud.com/netcommunity/adminpage.aspx?hbc=1&hbcmd=1&hbcmdweb=1&md=1&rl=False

Design Language

Fields to include

Select the fields to include on the membership form. Then select whether to require users to complete these fields before they submit the form.

Primary member

Include	Field	Require
<input checked="" type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Phone (gifts only)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Email (gifts only)	<input checked="" type="checkbox"/>

Additional member

Include	Field	Require
<input type="checkbox"/>	Title	<input type="checkbox"/>
<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>

Gift information

Include	Field	Require
<input checked="" type="checkbox"/>	Gift message	<input type="checkbox"/>

Add-ons

Select the add-ons to sell with this membership. For add-ons that allow multiple purchases, enter the maximum number that website users can buy. To edit the display order, click and drag items in the list.

Include	Add-on	Price	Maximum number for sale
<input type="checkbox"/>			

Save Cancel

Pledge Installment Improvements

With this release, we improved functionality for pledge installments to improve quality, and increase reliability, accuracy, and consistency.

These improvements ensure accurate and consistent behavior when adding or editing a pledge through a record, Enhanced Revenue Batch, or Revenue Update Batch in the following fields:

- The value in the **Installment amount** field consistently reflects the most recent amount entered.
- The values in the **Installment amount**, **No. installments**, and **No. installments remaining** fields are accurately calculated in the pledge installment grid.
- The **No. installments** and **No. installments remaining** fields represent the number of installments that are not fully paid.
- When you edit installment designations and enter different installment values, the value in the **Installment amount** field consistently represents the earliest installment amount that is not fully paid.

Tip: While the **No. installments** and **No. installments remaining** fields are labeled differently, both fields behave the same way throughout the program. For example, the **No. installments** field displays on the Add a pledge screen and represents the number of installments for a new pledge. The **No. installments remaining** field displays on the Edit pledge screen and represents the number of remaining installments for an existing pledge.

Sustained Giving

In recent releases, we introduced significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs. In 4.4, we made further changes to the recurring gift area.

In this release, you can now work with several payment handling options for recurring gifts. With these options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installment after applying a payment. Previously, you could only select to update installment amounts to match an incoming payment or maintain installment amounts. These new options offer more flexibility and accuracy for handling payments.

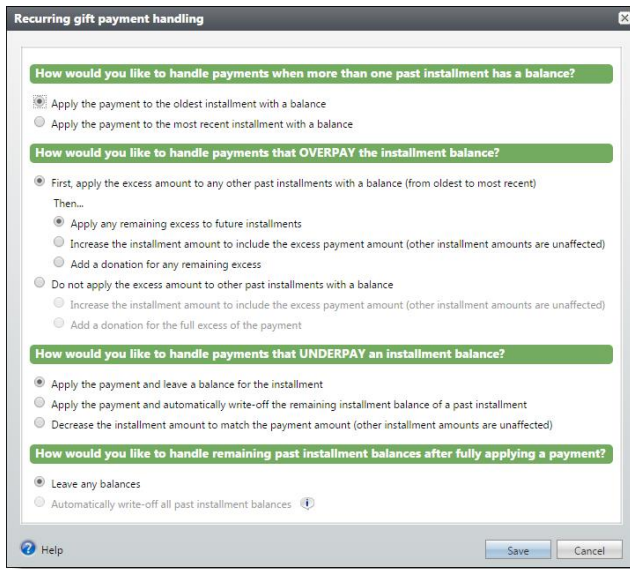
Recurring Gift Payment Handling

With this release, on the Revenue page, we replaced the **Recurring gift settings** configuration option with the new **Recurring gift payment handling** option.



Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

Click **Recurring gift payment handling** to access the Recurring gift payment handling screen.



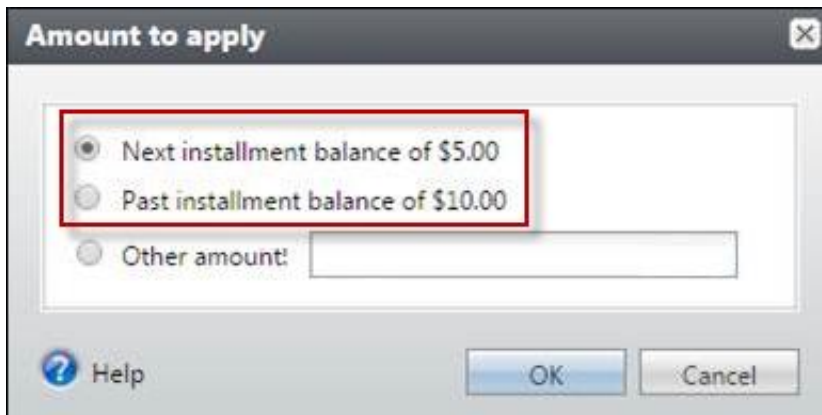
With these new configuration options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installments after applying a payment.

Note: Note that installments with today's date are included as "past installments" for the purposes of payment handling.

Add and Edit a Recurring Gift Payment

To ensure consistency across the product with the new payment handling options, we made several changes to the Add a payment and Edit a payment screens.

- When applying an amount to a recurring gift, on the Amount to apply screen, the **Next transaction amount** option now displays as **Next installment balance**. The **Past due amount** option now displays as **Past installment balance**.



- From the Amount to apply screen, note that **Past installment balance** is calculated based on the installment date. The calculation includes an installment balance that is due today or in the past.

Previously, this option was based on the installment status.

- Based on payment handling configuration options, donations created from overpaying an installment are automatically added in the application grid. A new donation is also created if you increase the amount in the **Applied** field.

Application	Description	Applied	Amount d...	Date ...	Balance	Remove
Recurring gift	Julie M. Bach	\$30.00	\$10.00	1/14/2...	\$0.00	▲
Donation	BUILDING	\$5.00				▼

Tip: Donations created from payment handling configuration options also affect recurring gift payments added through Enhanced Revenue Batch and Revenue Update Batch.

When you edit a recurring gift payment, it is important to note the following behavior:

- When you edit a recurring gift payment, the payment handling configuration options that existed when you initially added the payment will apply to future edits of the payment. Note that if you added a payment prior to version 4.4, the options in place prior to the upgrade will apply to all future edits of the payment.
- Payment handling configuration options consider future and past installments in terms of the recurring gift payment date, not the date the recurring gift is edited.

Consider the following scenario as an example:

On 02/05/2015 -

- A recurring gift has two installments due on 01/01/2015 and 02/01/2015 for \$5 each.
- The payment handling options are set to apply the payment to any past installments with a balance, and create a donation for any excess after that.
- A payment of \$10 is applied to the recurring gift which pays the installments for 01/01/2015 and 02/01/2015.

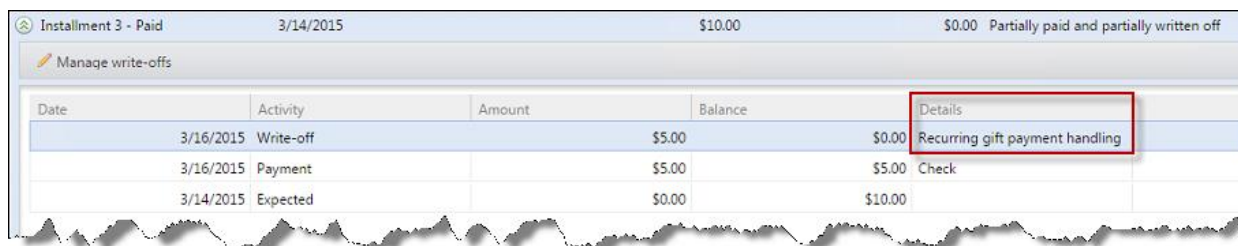
On 03/05/2015 -

- An installment is now due on 03/01/2015 for \$5.
- The payment that was added on 02/05/2015 is increased to apply \$15 to the recurring gift.
- The additional \$5 will be split off as a donation. The 03/01/2015 installment is treated as a future installment during this edit because it was considered a future installment at the time the payment was originally added.

Recurring Gift Activity Timeline

On a recurring gift record, the **Details** column of the Activity timeline now displays payment handling adjustment details for installments.

For example, when an installment is underpaid, and the payment handling option is set to apply the payment and automatically write-off the remaining installment balance, "Recurring gift payment handling" displays in the **Details** column.

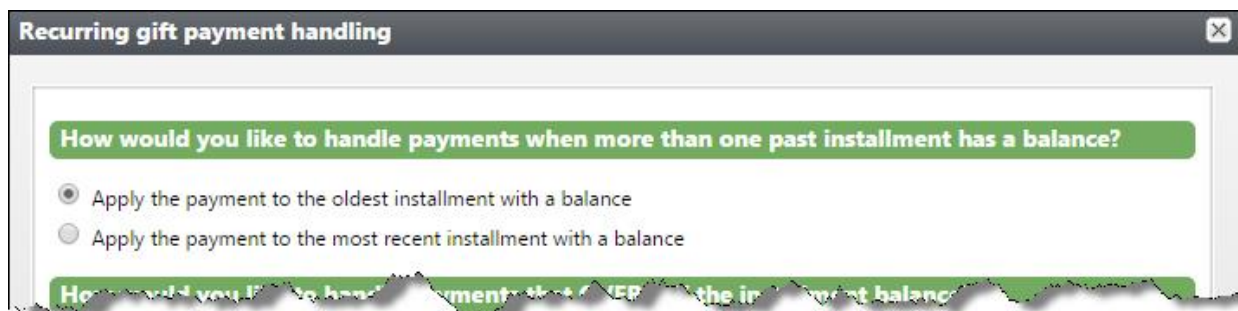


Date	Activity	Amount	Balance	Details
3/16/2015	Write-off		\$5.00	\$0.00 Recurring gift payment handling
3/16/2015	Payment		\$5.00	\$5.00 Check
3/14/2015	Expected		\$0.00	\$10.00

Warning: When a recurring gift payment is deleted, all associated write-offs and adjustments are deleted as well.

Next Installment Date Calculation

When you specify recurring gift payment handling configuration options, you can select to either apply a payment to the oldest or most recent installment with a balance.



Recurring gift payment handling

How would you like to handle payments when more than one past installment has a balance?

Apply the payment to the oldest installment with a balance

Apply the payment to the most recent installment with a balance

Based on your selection, the program calculates whether to apply payments to the oldest or most recent installment. Once this is calculated, the "next" installment to be paid is defined and reflected in the following areas of the program:

- Recurring gift transaction summary section
- Amount and date due on the Add a payment and Edit a payment screens
- Amount and date due in Enhanced Revenue Batch and Revenue Update Batch
- Installments associated with credit card and direct debit events, such as credit card processing and automatically generating payments
- Recurring gift next transaction date in *Query*
- Pledge reminders

Existing Recurring Gift Settings

Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

After you upgrade to 4.4, you must decide how you want the program to handle payments toward recurring gift installments. The following details explain how the previous option relates to the new payment handling option.

Update Installment Amounts to Match Payments

In the previous version, when you selected "Update installment amounts to match payments," the installment balance that was due increased to match the payment received. No underpaid installment balance or future installment was affected by the overpayment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
 - a. Select **Do not apply the excess amount to other past installments with a balance**.
 - b. Select **Increase the installment amount to include excess payment amount (other installment amounts are unaffected)**.
- To handle payments that underpay the installment balance, select **Decrease the installment amount to match the payment amount (other installment amounts are unaffected)**.
- To handle remaining past installment balances after fully applying a payment, select **Leave any balances**.

Maintain installment amounts

In the previous version, when you selected "Maintain installment amounts," the payment was applied toward the installment balances that were due and any overpayment amount was applied toward a later installment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
 - a. Select **First, apply the excess amount to any other past installments with a balance (from oldest to most recent)**.
 - b. Select **Apply any remaining excess to future installments**.
- To handle payments that underpay the past installment balance, select **Apply the payment and leave a balance for the installment**.
- To handle remaining past installment balances after fully applying a payment, select **Leave any balances**.

Opportunities Tile on Constituent Records

If you have the optional module *Prospects Management*, the constituent record now includes the Opportunities tile, which summarizes opportunity information for individual constituents who are major giving prospects. You can add and edit a constituent's opportunity information from the tile, including the opportunity's plan, the plan's primary manager, and other information about the opportunity.

The screenshot displays the constituent record for Michelle Jones. The record includes the following sections:

- Individual:** Lookup ID: 8-10000820, No declarations
- Constituencies:** Major giving prospect
- Personal Information:** Michelle Jones, Nickname, Maiden
- Contact Information:** Primary phone, Primary email
- Addresses:** (Add button)
- Primary Relationships:** Spouse, Household, Add to household, Primary business
- Documentation and Interactions:** Notes: 0, Media links: 0, Attachments: 0, Interactions: 9
- Memberships:** ID, Expiration, Level, Member since
- Opportunities (2 of 2):** Plan: Planned giving - Michelle's Planned ..., Primary manager: Charlie Kiger, Amount: €6,750.00 (Qualified)

The Opportunities tile is highlighted with a red box. At the bottom left, there is a "Show less" button, and at the bottom right, there is a "Customize tiles" button.

To add opportunities from the Opportunities tile, click **Add**. To edit opportunity information, click **Edit** next to the plan, primary manager, or the amount of the opportunity. If a constituent has more than one opportunity, you can use the arrows on the Opportunity tile to view each opportunity.

The amount that appears in the tile depends on the status of the opportunity. For example, if the opportunity status is qualified, response pending, rejected, or canceled, the tile displays the ask amount. If the opportunity is unqualified, the tile displays the expected ask amount. If the opportunity is accepted, the tile displays the accepted amount.

To open the related record, click the name of the plan, the name of the primary manager, or the opportunity amount.

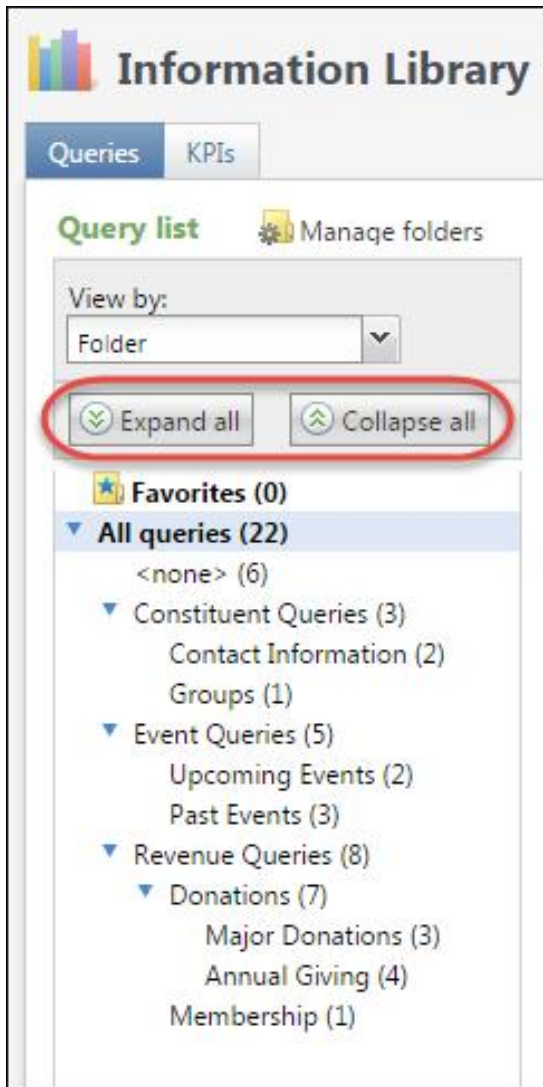
To open the Opportunities tab of the plan the Opportunities tile is displaying, click the tile name.

If you are interested in using the optional module *Prospects Management*, contact your Blackbaud Account Manager.

Expand and Collapse Query Folders

To help you better sort through and find your queries, we have added the ability to expand all or collapse all query folders in the Information Library.

On the Query tab of the Information Library, you can now click **Expand all** and **Collapse all** to easily view your folders and subfolders.

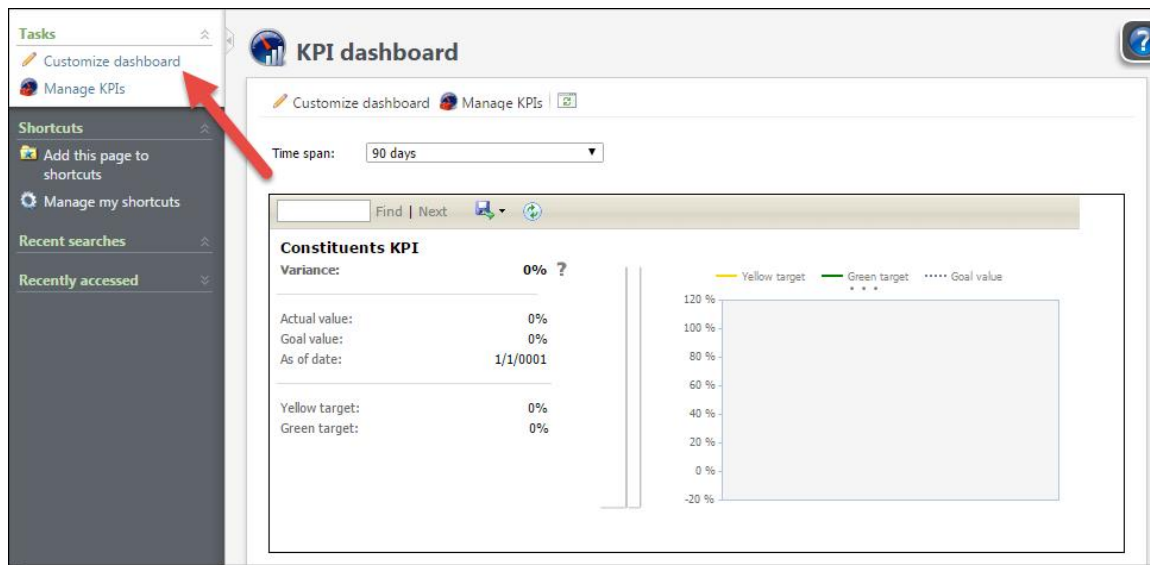


When you collapse all, only first-level folders are displayed. When you expand all, you see all your query folders and subfolders.

To access your queries, from *Analysis*, click **Information library**.

Customize KPI Dashboard

You can now customize your KPI dashboard. From the dashboard, click **Customize dashboard** under **Tasks**.



The new Customize a KPI dashboard screen appears. You can create pages and tabs within pages to organize your KPIs. To add pages or tabs, click the plus sign next to the **Page** or **Tab** fields. You can edit existing pages and tab names by clicking the pencil icon, or delete them by clicking the red X icon.

You can also reorganize tabs within a page. To do this, click the engine icon next to the **Tab** field. On the Reorder SKPI Dashboard tabs screen, use the up and down arrows to rearrange tabs and click **OK** to save the new order.

Once you have created pages and tabs, to assign KPIs to them, select the KPI and click the right arrow to add it, or the left arrow to remove it from a page or a tab.

To access your KPI dashboard, from *Analysis*, click **KPI dashboard**.