

# New Features Guide

01/27/2020 Blackbaud Altru 5.16 New Features US

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# New Features for Blackbaud Altru 5.16



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Before you use the new **Blackbaud Altru** features released in February 2020, 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.

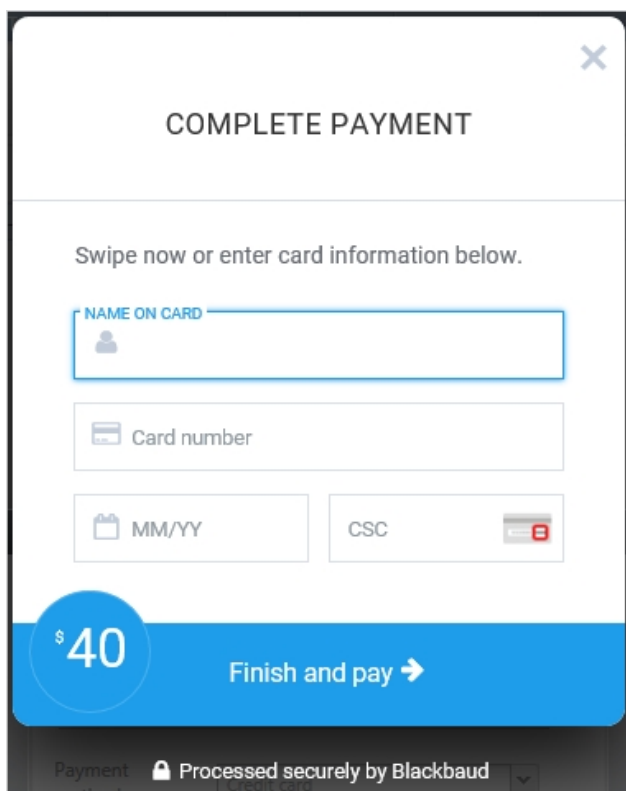
## Enhancements to Credit Card Processing in Daily Sales

In response to your feedback, we simplified the way you process credit card payments in Daily Sales.

### Pay the full order balance by credit card

Last year, we introduced **Blackbaud Checkout** for credit card processing in Daily Sales. As part of this change, you needed to confirm whether the patron wanted to pay the full order balance (or only a partial amount) before you entered card details.

In this release, we eliminated the need for an extra click when a patron pays the full order balance. Now when you select **Credit**, the Complete Payment form opens immediately and defaults to the full amount.



To add a payment, swipe or enter the credit card information. Then return to the order to complete the sale.

## Pay a partial amount by credit card

When a patron only wants to pay a portion of the balance by credit card, you can quickly add a partial credit card payment in Daily Sales with the new **Partial Credit** button.

1. From a pending order, select **Partial Credit**. The Add a payment form appears.

The screenshot shows the Blackbaud Altru interface for adding a payment to an order. The order is #10000185 and contains one item: 'Adult - General Admission' for \$40.00. A numeric keypad is visible on the left, and a 'Partial Credit' button is highlighted with a red box. An 'Add a payment' dialog box is open, showing a balance of \$40.00 and an amount of \$20.00. A red dashed arrow points from the 'Partial Credit' button to the dialog box. The dialog box has 'Save' and 'Cancel' buttons. Below the dialog box, there is a summary table:

<b>Total:</b>	<b>\$40.00</b>
<b>Tendered:</b>	<b>\$0.00</b>
<b>Balance:</b>	<b>\$40.00</b>

2. Adjust the amount, then click **Save** or press **ENTER** on your keyboard.
3. Swipe or enter the credit card information on the Complete Payment form.
4. After all payments are added and the balance is zero, complete the sale.

**Note:** You can also use the Daily Sales numeric keypad to enter partial payments. To add a payment for a specific amount, click or enter the number on the keypad, and then select the payment method. For example, to accept a \$50 credit card payment, click 5 and 0, then select **Credit** or **Partial Credit**.

## Enhancements to Credit Card Processing in Advance Sales

We made several enhancements in Advance Sales to provide a more modern and simplified payment experience for you and your patrons.

### Process credit cards through Blackbaud Checkout

Credit card payments entered through Advance Sales are now processed through the **Blackbaud Checkout** payment form. Your payment forms will be updated automatically and there is no additional configuration necessary.

COMPLETE PAYMENT

Swipe now or enter card information below

Name on card

Card number

MM/YY CSC

\$ 42 Finish and pay →

Processed securely by Blackbaud

## Indicate whether a card is present

You can now indicate if a physical card is present when you select **Credit** from the Add payment screen of the Advance Sales page.

- To physically swipe a credit card through a card reader device, select **Card present**.
- To key in the credit card information, such as when you accept a payment over the phone, select **Card not present**.

**Add a payment**

Balance: \$42.00

Amount:

**Payment information**

Credit card option:  Card present  
 Card not present

Help Save Cancel

For your convenience, the Add a payment form remembers which option you select. The next time you add a credit card payment from Advance Sales, the card option defaults to your most recent selection.

## Point-to-Point Encryption (P2PE) for Advance Sales and Daily Sales

Last release, we introduced point-to-point encryption for credit card payments entered in an Enhanced Revenue or Revenue Update Batch. Now you can enable this feature in both Advance Sales and Daily Sales.

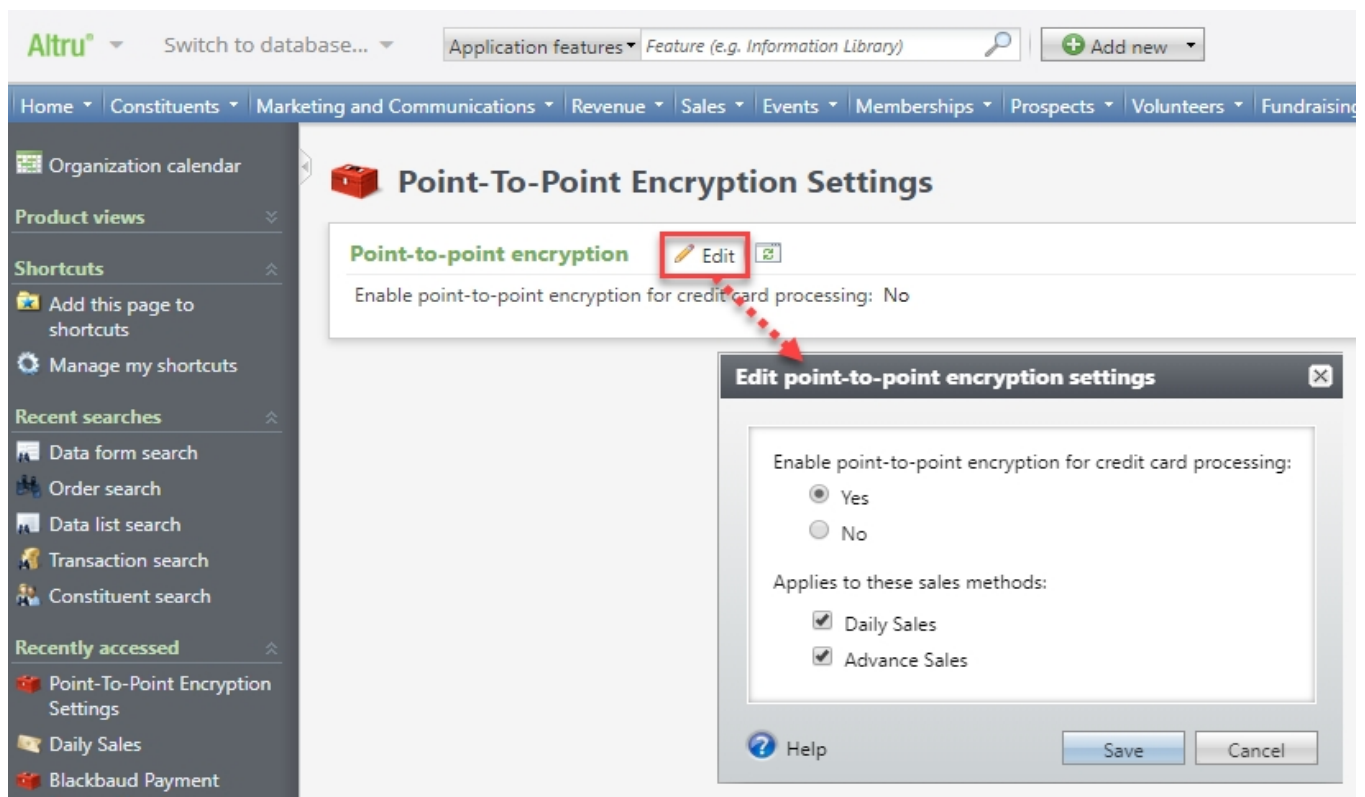
**Note:** P2PE is available to organizations who process credit card payments through **Blackbaud Merchant Services (BBMS)**. To learn more, or to sign up for the solution, visit <http://www.bluefinpartner.com/blackbaud>.

### Enable point-to-point encryption

Before you enable point-to-point encryption, configure your Bluefin P2PE device. If you previously used the device in another solution, contact your Bluefin relationship manager to have the device configured to work with **Altru**. For more information, see the [Bluefin-Blackbaud integration guide](#).

To enable point-to-point encryption in Advance Sales and Daily Sales:

1. From *Revenue*, select **Point-to-point encryption settings** under **Configuration**. The Point-to-Point Encryption Settings page appears.
2. Select **Edit**.



3. Select whether to enable P2PE for credit card processing. When you enable P2PE, all available sales methods are selected by default. If you don't plan to use a P2PE device to process credit cards in a particular sales method, deselect it from the list.
4. When finished, click **Save**.

**Note:** After point-to-point encryption is enabled, all users must enter credit card payments through a Bluefin P2PE device in any sales methods where P2PE is enabled.

## Reduce Duplicate Records Created Through Web Forms

To help you reduce the number of duplicate constituent records created through web forms, we added a new setting under *Administration*, **Constituent matching settings**. Enable this setting to ignore **Altru's** default constituent matching algorithm and automatically merge an incoming record when its first name, last name, and email address exactly match an existing record.

By default, **Altru** compares biographical fields such as title, first name, last name, suffix, and address to determine whether an incoming record is a possible duplicate. In many cases, this information is enough to identify and help prevent duplicate records. However, depending on the fields you collect and require through your web forms, constituents may create records that only have values for first name, last name, and email address. Without address information, it's unlikely that these records would've previously been identified as a "likely match."

When you enable the new constituent matching setting introduced in this release, the standard algorithm is ignored when **Altru** compares incoming records created through web forms. Instead, the



record is considered an exact match and is automatically merged when it has the same first name, last name, and email address as an existing record.

To enable this setting:

1. From *Administration*, select **Constituent matching settings** under **Data**.
2. Select **Ignore additional matching criteria if first name, last name and email address match exactly**.
3. Select **Save**.

**Configure constituent matching**
✕

### In batch

Action <span style="font-size: 0.8em;">?</span>	Threshold	Match confidence <span style="font-size: 0.8em;">?</span>
<input checked="" type="checkbox"/> Process automatically*	Matched constituents	100% - <input style="width: 40px; text-align: center;" type="text" value="95"/> %
<input checked="" type="checkbox"/> Review constituents	Possible matches	94% - <input style="width: 40px; text-align: center;" type="text" value="70"/> %
Create new record	No match	69% - 0%

\*For batches created with the constituent batch type, all matches will require manual review.

### Not in batch (single record entry)

Action <span style="font-size: 0.8em;">?</span>	Threshold	Match confidence <span style="font-size: 0.8em;">?</span>
Review constituents	Possible matches	100% - <input style="width: 40px; text-align: center;" type="text" value="70"/> %
Create new record	No match	69% - 0%

### From web forms (submitted online by constituents)

Action <span style="font-size: 0.8em;">?</span>	Threshold	Match confidence <span style="font-size: 0.8em;">?</span>
Process automatically	Matched constituents	100% - <input style="width: 40px; text-align: center;" type="text" value="93"/> %
Create new record	No match	92% - 0%
<input checked="" type="checkbox"/> Ignore additional matching criteria if first name, last name and email address match exactly		

? Help

Save
Cancel

**Note:** When enabled, this setting only applies to incoming constituent records created through web forms.