New Features Guide

01/14/2019 Blackbaud Altru 5.12 New Features US

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New Features for Blackbaud Altru 5.12

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Before you use the new ***Blackbaud Altru*** features released in January 2019, 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.

Schedule Multiple Day Events

You can now create event packages to sell a series of preregistered events for a single flat rate. For example, you can schedule each day of a weeklong summer camp and group the days together into an event package. A parent can register their child to attend the weeklong camp and pay one fee for the entire session. In ***Altru***, you can then view the child's registration information across individual days within the camp, allowing you to accurately track attendance on a day-to-day basis.

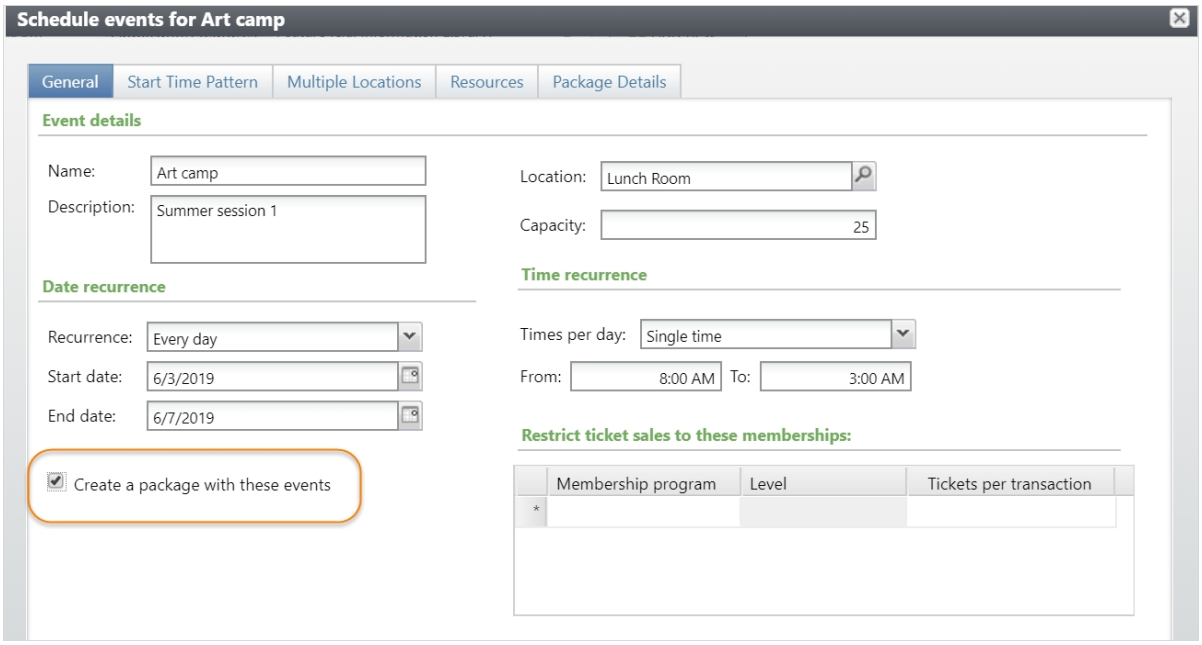
When creating an event package, you can specify whether patrons can register for individual events within the package. For example, summer camp registrants may be required to attend the entire week, but you may offer a pottery class that meets every Monday for a month. You can configure the pottery class so that patrons can pay a flat rate to attend the entire month, or they can opt to sign up for individual classes on specific Mondays. To provide an incentive to buy more classes, you can define a discounted rate for patrons who purchase the entire package of pottery classes.

At this time, event packages can be sold online or through *Advance Sales*.

Configure Event Packages

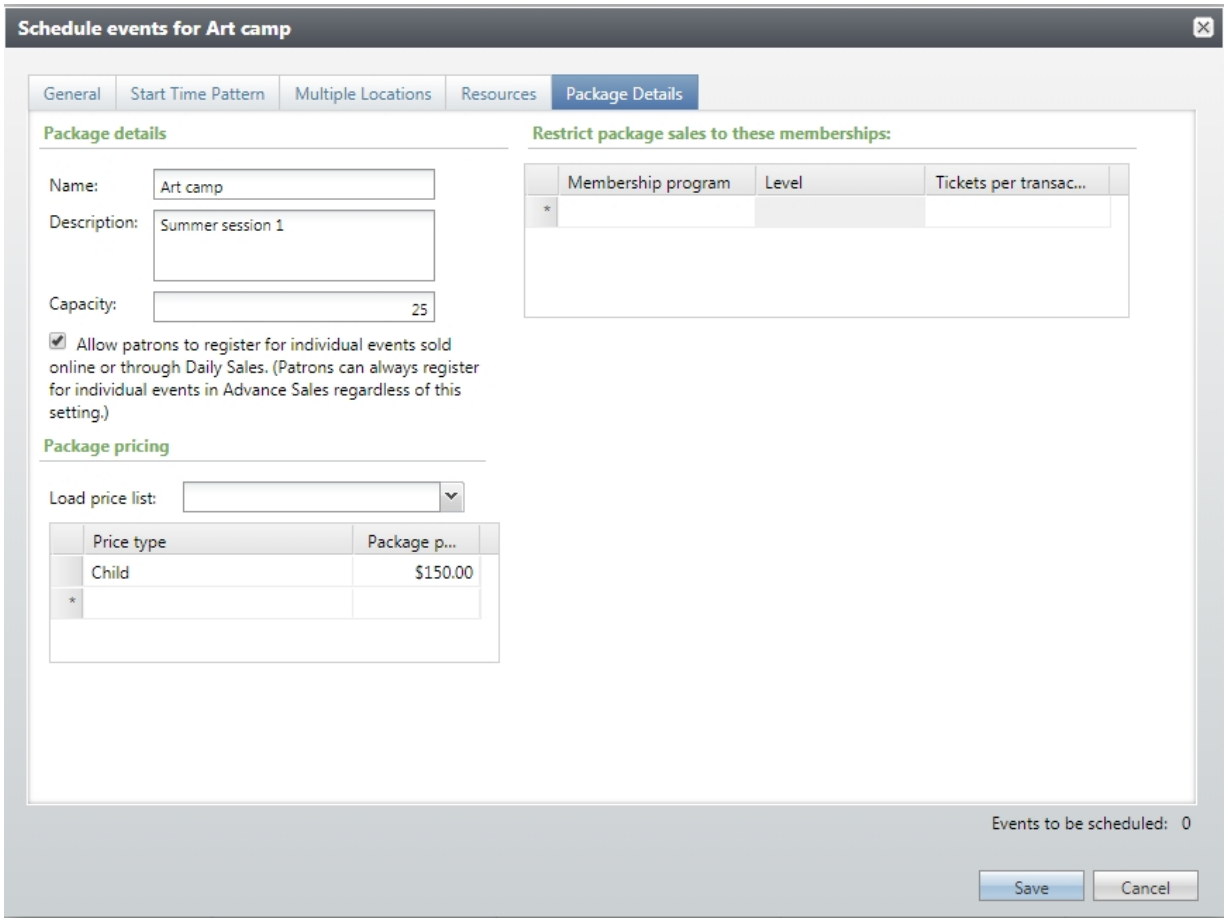
You can configure event packages for scheduled programs that require registration.

1. In *Tickets*, from a new or existing preregistered scheduled program, select the Event List tab.
2. Select **Add**.
3. On the Schedule events screen, select the recurrence and start and end dates for individual events in the package.
4. To create the event package, select **Create a package with these events**. The Package Details tab appears.
5. Complete the General, Start Time Patterns, Multiple Locations, and Resources tabs as needed. These settings still apply to the individual events in the package.



6. Select the Package Details tab. All settings default from the program to the package, but you can update them as needed. For example, you can enter a different name, price or capacity for your package. To avoid overselling an event, the package capacity must be less than or equal to the capacity set for your events.
7. To allow package events to be sold individually when purchased online or through daily sales, select **Allow patrons to register for individual events sold online or through Daily Sales. (Patrons can always register for individual events in Advance Sales regardless of this setting.)**. For example, you may want to sell discounted packages but allow patrons to register for individual events at full price.

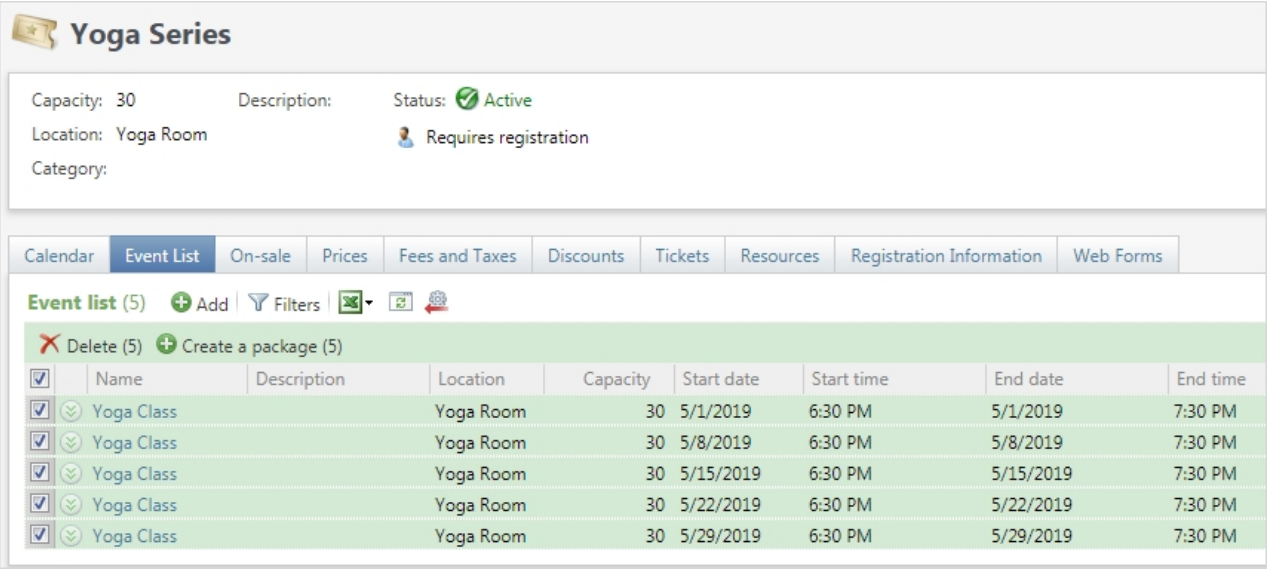
   If you leave this option unmarked, patrons can only register for package events individually through advance sales.



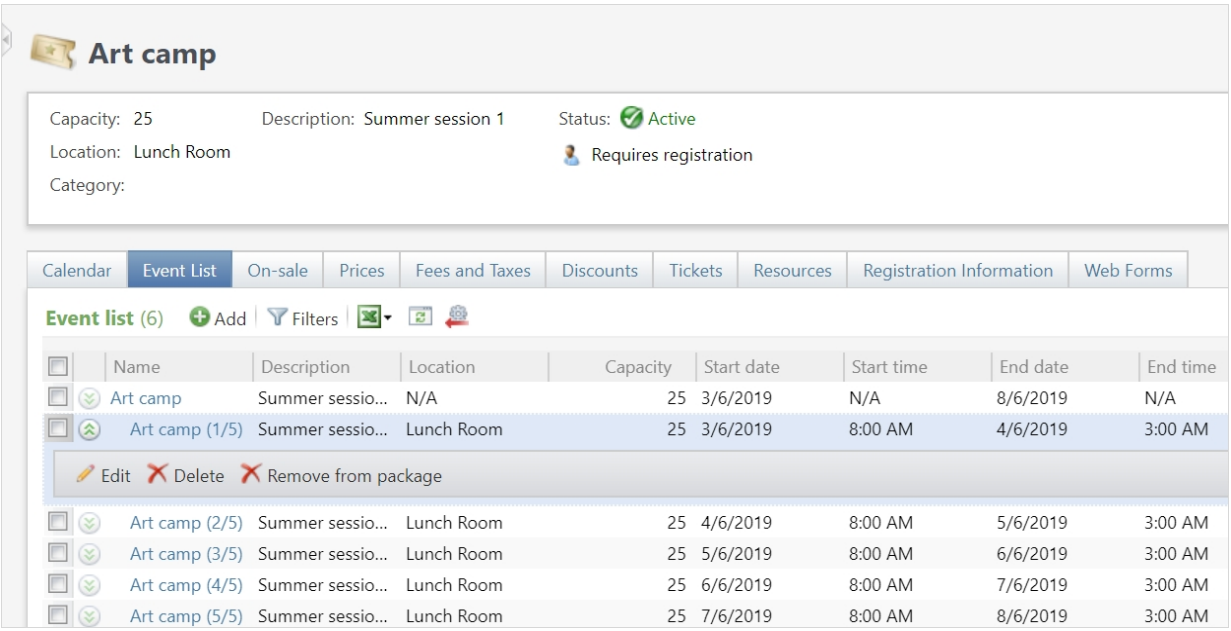
8. Click **Save**. You return to the Event List tab and the new package appears in the list.

Event List Tab

On the Event List tab, you can view and manage all packages and individual events available for the program. You can also group existing events into a new package.



- To group existing events into a new package, select the checkbox for each independent event and then select **Create a package**. On the create a package screen, enter all relevant details for the package. When finished, click **Save**.



- To edit, delete, or remove an event from the package, select the event in the list and click **Edit**, **Delete**, or **Remove from package**. When you remove an event from a package, it remains on the program as an individual event.
- To delete or remove multiple events from the package at one time, select the checkbox for each event and then select **Delete** or **Remove from package**.
- To add an individual event to an existing package, select the event and then select **Add to existing package**.
- To edit or delete a package, select the package and click **Edit** or **Delete**.

Note: Once a package is sold, you cannot edit or delete it, or remove its events.

Manage Packages

To open a package record from the Event List tab, select its name in the list. On the package record, you can view details including the capacity, on-sale information, and whether its events can be sold individually. On the tabs, you can:

- Edit package prices.
- Enter custom registrant information. For example, you can enter questions that pertain to the entire package rather than individual events. If you allow package events to be sold individually online, you can enter custom registration information on the event records.
- View the current registrants for the package and individual package events.
- By default, event package web forms display the description set for the program, but you can enter a custom description for the package. Individual events in the package display the program's description, but you can also enter custom descriptions on the event records.

To edit a package, under **Tasks**, select **Edit event package**. You can change all the settings that defaulted from the program, such as on-sale information and membership restrictions. For example, if a package isn't selling well, you might want to change the setting to allow package events to be sold individually. Or you can edit the pre-sale information to make packages available for pre-sale before individual events.

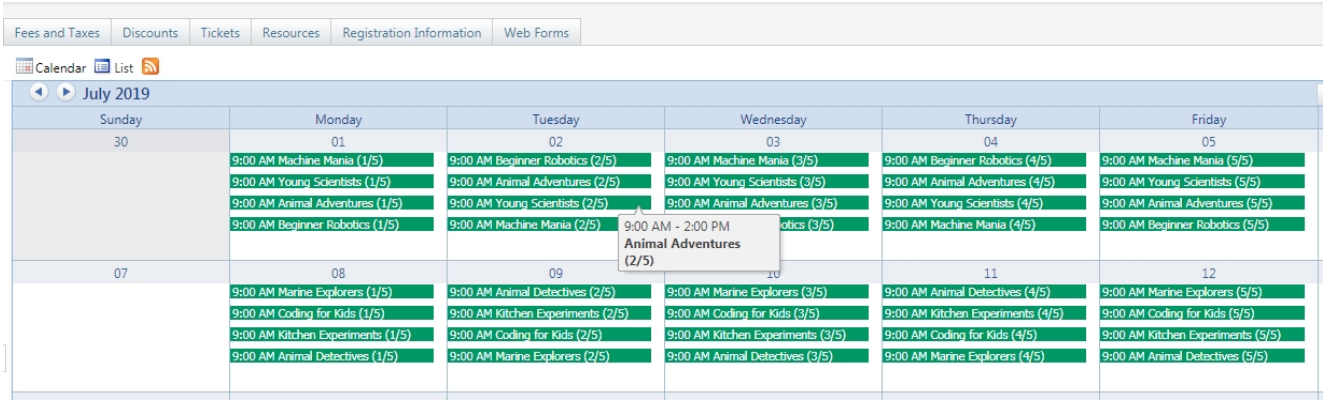
To view a roster of current registrants, under **Tasks**, select **View master roster**. Use the **Package recipient** column to determine whether the registrant purchased the full package or individual events in the package. This list only includes registration information — to view attendance, use each individual event's roster.

Manage Package Events

There are a few changes to event records when they are part of a package.

Calendar view

When you view package events on the calendar, they're identified as part of a package. For example, the third recurrence of a package containing 10 events is labeled '(3/10)'. You can open an individual event to edit its settings at any time.



Event records

- The Registrants tab includes all registrants for the event. The **Package Registrant** column displays whether the registrant purchased the full package or only the individual event.
- To view a roster of registrants for the event, under **Tasks**, select **View roster**. This roster also provides attendance information.
- To remove the event from the package, under **Tasks**, select **Remove from package**

Package Sales

Package sales are similar to individual event sales, with some exceptions.

Advance Sales

From the Create order tab in *Advance Sales*, enter a date range to view packages with events during that period. Each package event appears after the parent package name. Events that haven't gone on sale yet still appear in the list but are disabled. You can add the entire package to the order or individual events from the package.

Online Sales

Packages can be sold online once web forms have been configured. For more information on enabling package forms for online sale, refer to Package Web Forms on page 9.

Daily Sales

At this time, packages cannot be sold through daily sales. However, if **Allow patrons to register for individual events sold online or through Daily Sales** is marked for a package, you can sell individual events from a package in daily sales.

Discounts

- **Per-item**

  You can create standard, per-item discounts for packages.

  To make an item-level discount available for packages, on the General tab of the discount, select **Applies to event packages**, then select the price type and value/percentage. On the Programs tab, choose which programs the discount applies to.

  For performance reasons, item-level discounts cannot be configured to apply to both individual event tickets and packages. If you offer the same discount for both types of events (for example, a 10% member discount), create two separate discounts.

  On the Discounts tab of the program record, there is a new **Item type** column which displays whether the discount applies to tickets or event packages.

- **Per-order**

  You can configure order-level discounts to apply to packages.

  For discounts that calculate a specific amount off, the discount will apply to packages automatically.

For discounts that calculate a percentage off, configure the discount to apply to packages. To make a percent-off discount available for packages, on the General tab of the discount, select **Applies to event packages**.

Sales Orders

When a patron purchases a package, the total amount paid for the package is split between each event. For example, if they pay $100 for the package of 5 classes, the order will show each class with a payment of $20.

At this time, packages cannot be rescheduled. To register the patron for another package, refund the current package payment to a different payment method and then re-register the patron for another package.

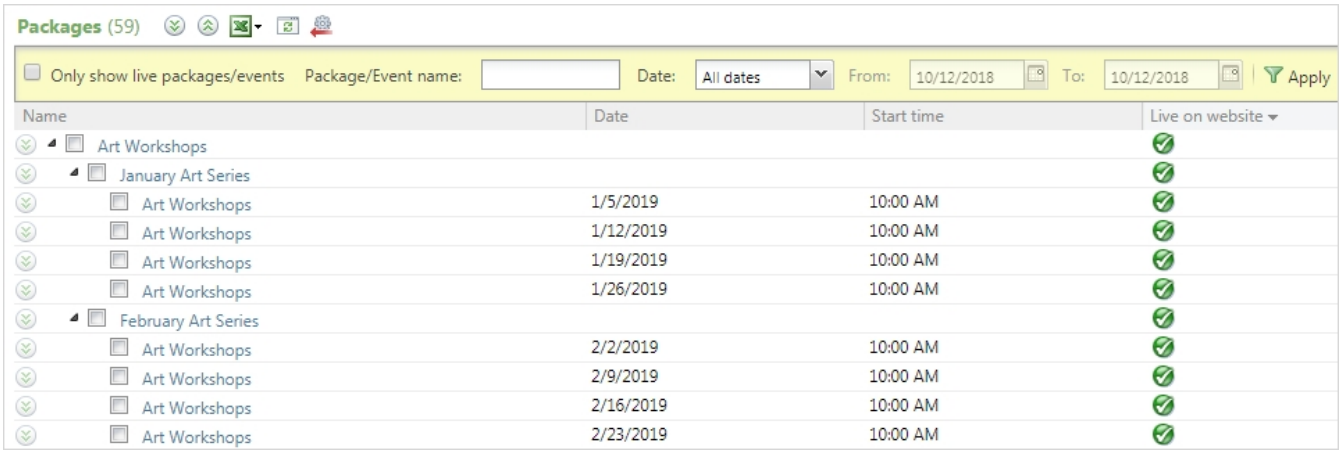
Refunds

You can issue a full refund for a purchased package. At this time, you cannot issue partial refunds for a package or for individual events in the package.

Package Web Forms

With event package forms, online users can register for event packages. For example, a parent can use this form to register their child for a week of camp.

To configure event package forms, go to *Web* and click **Manage event package forms**. Under **Manage Event Package Forms**, the list displays your organization's preregistered programs with event packages and their associated events.



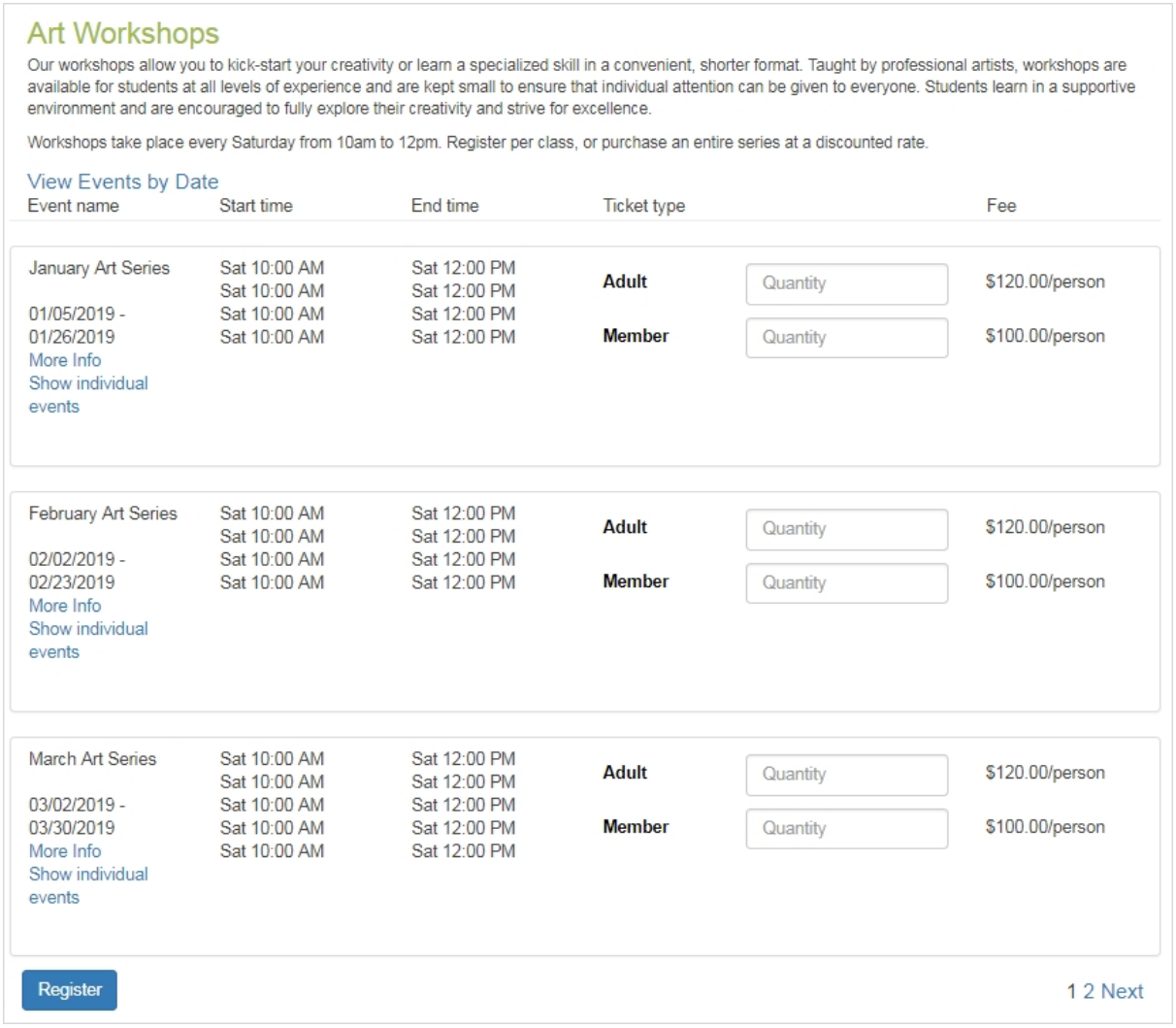
From this area you can complete several tasks. You can:

- Open and edit program, package, or event records.
- Edit the default acknowledgement emails or the descriptions that appear on the form.
- Edit the design and language options on the package. If the program allows online sales for individual events, you can also update options for events.

Note: If **Allow patrons to register for individual events sold online or through Daily Sales** is selected on a package, you'll need to approve each individual event you want to sell on the website.

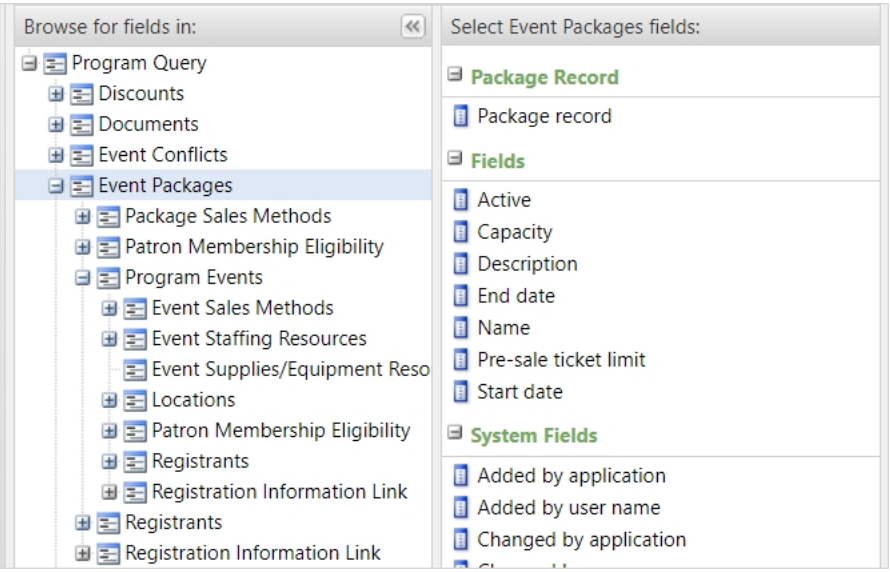
When an event package form is live on the website, it looks very similar to an event registration form but also includes additional options.

- Users can register for up to five different packages or events on the same page.
- If a program contains more than five packages or events, page numbers appear at the bottom of the form. Users can navigate between multiple pages to view and register for additional events.
- If custom descriptions have been entered, users can click **More Info** on a package or event to view additional details.
- If **Allow patrons to register for individual events sold online or through Daily Sales** is selected on a package, and individual events have been approved for website, users can click **Show individual events** to expand a package and register for individual events.
- When adding a registration to the shopping cart, users are offered the option to either proceed to their cart, or continue shopping and remain on the current page.
- Once a user registers for an event, their information can be auto-filled to other events they add to the cart.
- Package details (now including registrant name) appear in the shopping cart, in the receipt grid on the confirmation page, and in the acknowledgement email sent after checkout.



Package Queries

In program queries, you'll find a new node for **Event Packages**. Under **Program Events**, you can drill down for information about individual events within the package.

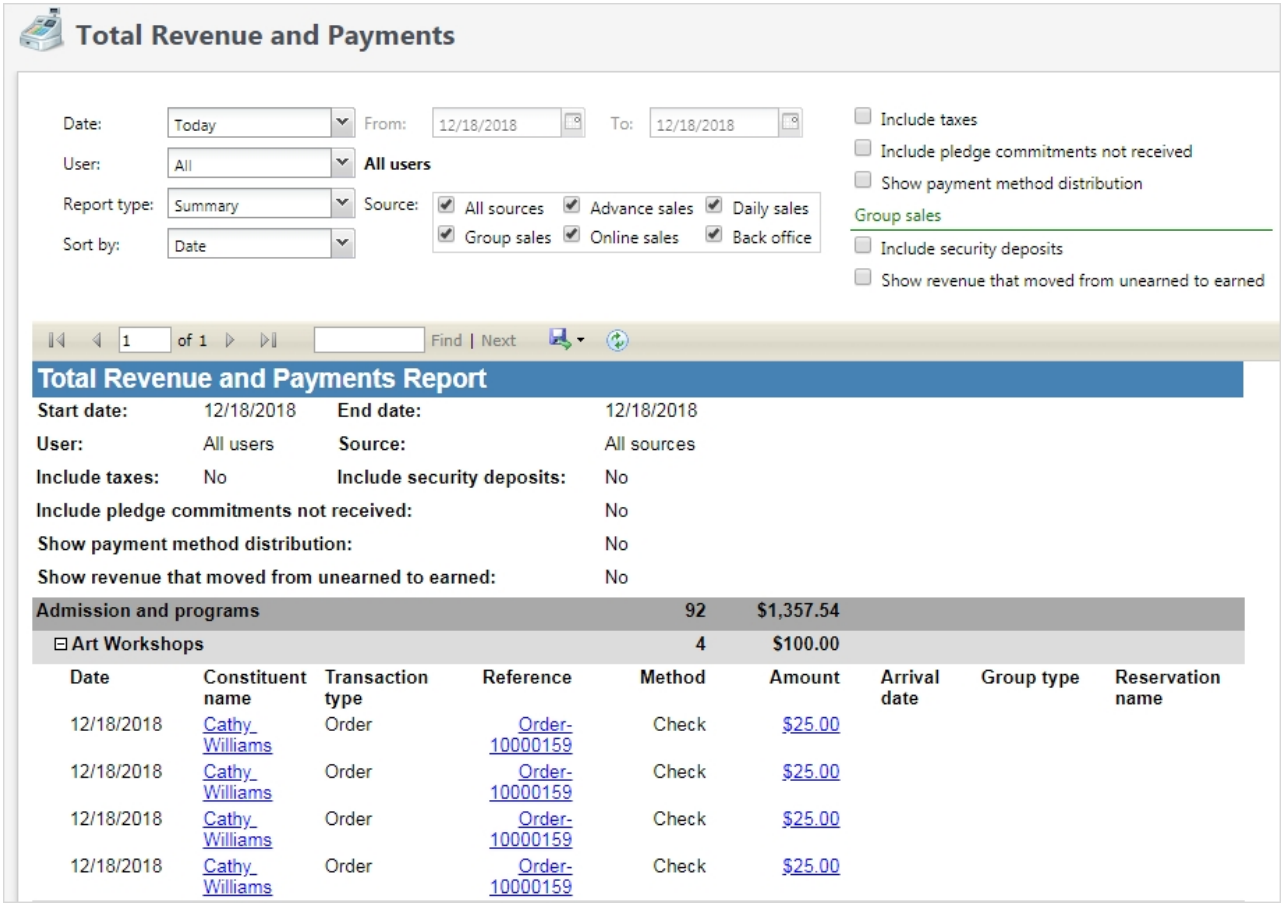


Package Reports

Total Revenue and Payments

Event revenue earned through the sale of a package appears on the Total Revenue and Payments report under **Admission and programs**.

When a package is purchased, the total amount of revenue earned is split between each individual event. For example, if a patron paid $100 for a package of four classes, the Total Revenue and Payments Report will show four payments of $25.



Preregistered Program Roster

The Preregistered Program Roster can now be viewed at both the package level and at the individual event level.

From a package record, under **Tasks**, select **View master roster**. The master roster provides an overall list of registrants who have signed up for the package, or any individual events within the package. Use the **Package recipient** column to determine whether the individual is registered for the entire package or individual events. This list only includes registration information — to view attendance, use the event's roster.

From an event record, under **Tasks**, select **View roster**. The event roster shows all registrants for the event, and is intended to be a printable list you can use to track attendance. Use the **Package recipient** column to determine whether the individual is registered for the entire package or individual events.