

New Features Guide

08/07/2019 Blackbaud Altru 5.14 New Features US

©2019 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

NewFeatures-2019

New Features for Blackbaud Altru 5.14

Email Itemized Receipts From Group Sales	3
Email Group Sales Order Balance Notifications	6
Blackbaud Checkout	9

Before you use the new **Blackbaud Altru** features released in July 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.

Email Itemized Receipts From Group Sales

You can now email itemized receipts from group sales reservations. New options on the Add a payment screen allow you to choose how to print the itemized receipt at the time of entering a payment. Depending on your configuration, you can print, email, or provide no receipt.

Before you can email itemized receipts, you must configure itemized receipt options. From the Sales Methods page in *Tickets*, select **Group Sales**, then select the new Itemized Receipt Options tab to choose which printing options to make available.

The screenshot shows the 'Sales Methods' configuration page for 'Group Sales'. The status is 'Active'. The 'Itemized Receipt Options' tab is selected, showing a table of options:

Name	Active
Print receipt	<input checked="" type="checkbox"/>
Email receipt	<input checked="" type="checkbox"/>
No receipt	<input checked="" type="checkbox"/>

Additional options include 'Mark active' and 'Email template'.

To enable a receipt option, expand the row and click **Mark active**. A green checkmark appears in the **Active** column for each option you make active. 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.

Note: Previously, you managed printing rules for group sales under *Tickets*, **Sales Documents**, **Itemized Receipt**. If your organization previously printed receipts for group sales, the new print receipt option will be enabled by default. Otherwise, the option will be unavailable until you mark it active.

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.

Note: The template is shared among all sales methods — if you have already configured the email template for Daily Sales and Advance Sales, you do not need to configure it for Group Sales.

Receipt email

Subject:

From address: From name:

Email opening

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

Please retain this receipt for your records.

Save Cancel

After enabling email receipts for Group Sales, a new **Receipt method** dropdown appears on a reservation's Add a payment screen.

Add a payment

Balance: \$22.00
Amount: \$22.00

Payment information

Payment method: Check

Check date:

Check number:

Receipt Options

Receipt method: Print receipt
Print receipt
Email receipt
No receipt

Help Save Cancel

When you select Email receipt, a dropdown appears listing any email addresses on file for the reservation contact.

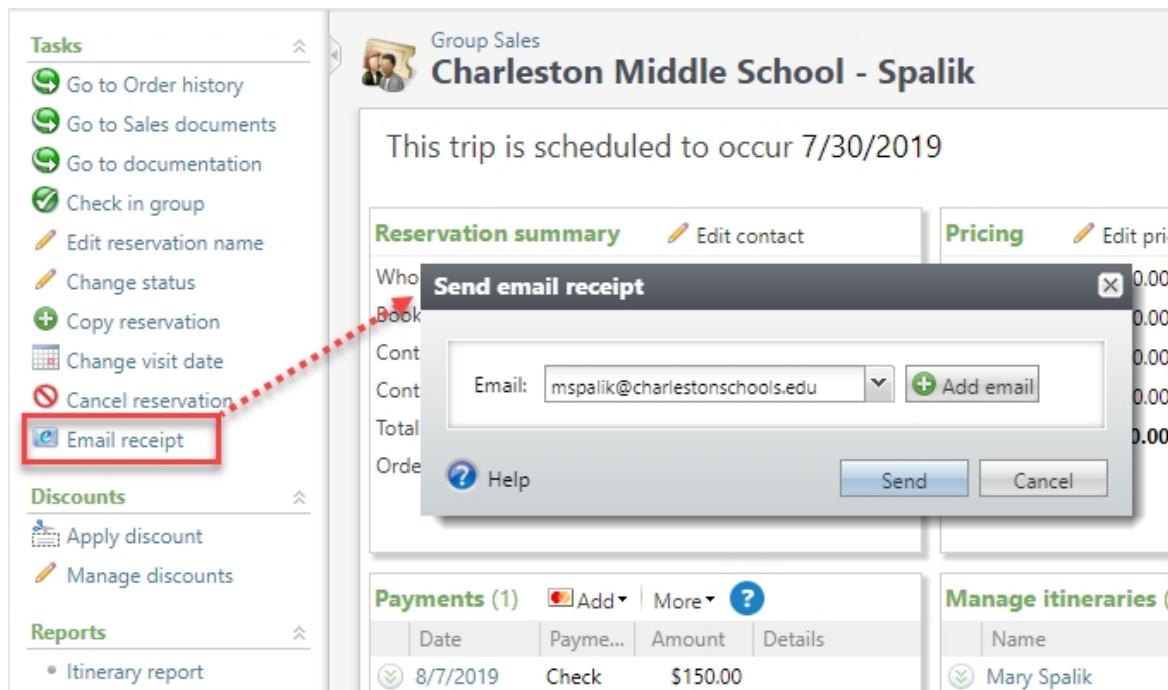
Receipt Options

Receipt method: Email receipt

+ Add email

You cannot update a constituent's existing email address from the Add a payment screen, but you can enter a new email address that is saved to the constituent's record. Click **Add email** to access the Add an email address screen.

Note: You can also email an itemized receipt from a reservation record. From the reservation, click **Email receipt** under **Tasks**. Select an existing email address, or click **Add email** to add a new email address for the reservation contact.



Email Group Sales Order Balance Notifications

You can now email a copy of the group sales order balance directly from **Altru**. The order balance notification contains a summary of important information on the reservation, including total number of visitors, the visit date, the remaining order balance and due date, and any previous payments made.

Before you can email the order balance notification, you must configure the order balance email template. The template includes a customizable introduction and closing, as well as required fields such as a **Subject**, **From address**, and **From name** for the email.

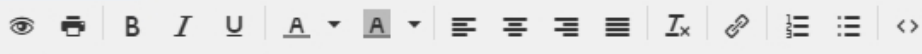
From the Group Sales Setup page in *Tickets*, select **Order balance email template**.

Order balance email [X]

Subject:

From address:
From name:

Email opening

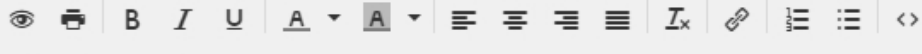

Verdana small

Thank you for your reservation.

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

Order balance details such as number of visitors, visit date, order balance, and number of days past due (if applicable) will be inserted here when the email is sent.

Email closing


Verdana small

Please retain this email for your records.

This is an example of an order balance notification email using the default opening and closing text.

Thank you for your reservation.

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

Order number 10000237

Order Summary

Patron:	Jillian Lewis		
Reservation name:	ABC High School		
Contact:	Jillian Lewis	Balance:	\$100.00
Total visitors:	33	Due date:	7/19/19
Visit date:	8/2/19	As of 6/14/19 balance is 0 days past due.	
Arrival time:	9:30AM		

Charges

Name	Quantity
Admission - Chaperone	1
Admission - Group Student	30
Admission - Teacher	2
Facility - Museum Cafe	-
Lunch	33

Payments

Date	Payment method	Details	Amount:
6/14/19	Check	Check #1234, 06/01/2019	\$100.00

Balance

Total cost:	\$200.00
Amount paid:	\$100.00
Balance:	\$100.00

Please retain this email for your records.

You can email order balance notifications once the template is configured.

To email the notification from a group sales reservation, click **Order balance** in the **Due dates** grid on the reservation, and then click **Email order balance**. A dropdown appears listing any email addresses on file for the reservation contact.

Email order balance ✕

Email: + Add email

Group resources by:

You cannot update a constituent's existing email address from the Email order balance screen, but you can enter a new email address that is saved to the constituent's record. Click **Add email** to access the Add an email address screen.

Choose whether to group resources by resource category or resource name. Then, click **Send**. When you email the notice, the order balance is automatically marked as sent and an "Order Balance Sent" entry is added to the Order History page. An "Order Balance (email)" entry is also added to the Sales Documents page.

Note: You can also send the email when viewing the order balance report. This is helpful when you want to preview the information that will be included in the notification. From the reservation record, click **Order balance** under **Tasks**. Click **View report** to see the order balance information. Under **Tasks**, click **Email order balance** to send the notification.

Blackbaud Checkout

Now in **Altru**, credit card payments entered through Daily Sales or Online Sales are processed through the **Blackbaud Checkout** payment form. **Blackbaud Checkout** provides a more modern and simplified payment experience for your patrons, and supports digital wallet payment options for web forms, such as Masterpass and Visa Checkout.

Your payment forms will be updated automatically and there is no additional configuration necessary to process credit cards. However, if your organization uses **Blackbaud Merchant Services**, you can choose to enable digital wallet payment options for one-time payments in Online Sales.

➤ Daily Sales

The steps to add a credit card payment in Daily Sales remain unchanged, with one exception. Previously when you clicked the **Credit** payment method, the **Add a payment** form showed the balance owed, amount to be paid, and fields for credit card information.

Add a payment [X]

Balance: \$38.00
Amount:

Payment information

Payment method: [v]

Name on card:

Card number:

Expires on: [calendar icon]

CSC:

Billing address

Country: [v]

Address:

City:

State: [v]

ZIP: [magnifying glass icon]

Email:

Phone:

[?] Help [Save] [Cancel]

Now when you click the **Credit** payment method, you need to confirm whether the patron is paying the full order balance by credit card (or only a partial amount) before swiping or entering card details.

- To pay the full balance, on the **Add a payment** form, click **Save** or simply press **ENTER** on your keyboard.
- To only pay a partial amount, adjust the **Amount** before you **Save**.

Add a payment [X]

Balance: \$40.00
Amount:

Payment information

Payment method: [v]

[?] Help [Save] [Cancel]

After you confirm the amount to be paid by credit card, swipe or enter the credit card information on the new **Complete Payment** form.

COMPLETE PAYMENT

Swipe now or enter card information below.

NAME ON CARD

Card number

MM/YY CSC

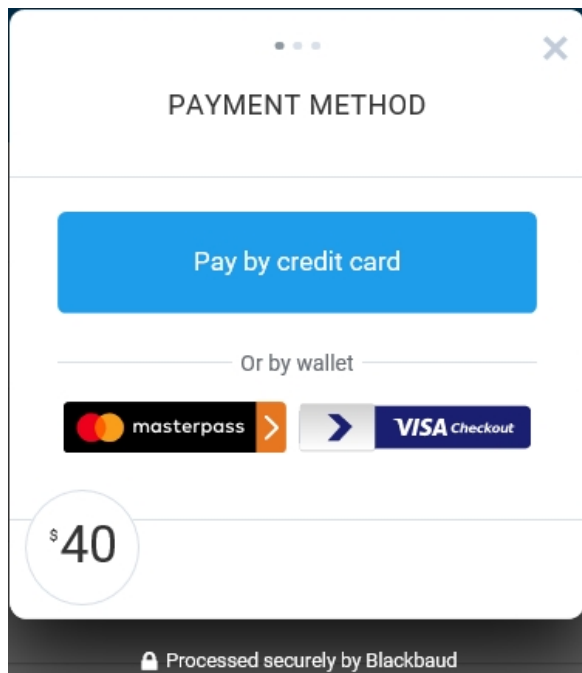
\$40 Finish and pay →

Payment Processed securely by Blackbaud

After all payments are added and the balance is zero, you can complete the sale.

➤ Online Sales

Altru web forms now process payments through **Blackbaud Checkout**. After the upgrade, you will see the changes immediately—there are no additional steps needed to configure the new credit card payment screen. However, if your organization processes credit cards through **Blackbaud Merchant Services**, you can choose to enable digital wallet payment solutions (such as Visa Checkout and Masterpass) to maximize convenience for your patrons. There is no additional charge to accept these payments, and these secure checkout options allow users to skip filling out lengthy forms usually associated with online credit card transactions.



Enable Digital Wallet Payment Solutions

To enable digital wallet payment solutions for one-time payments:

1. From *Web*, select **Web Payment Settings** under **Configuration**.
2. Under **Payment methods**, select the checkbox for Visa Checkout and/or Masterpass.
3. When finished, click **Save**. The new payment options appear when your patrons proceed to check out.

Note: Don't see these options? Digital wallet payment solutions are only supported by **Blackbaud Checkout** for organizations who process credit cards through **Blackbaud Merchant Services**. To learn more, visit <https://www.blackbaud.com/solutions/payment-services/merchant-services>.