

# New Features Guide

07/29/2020 Blackbaud Altru 5.18 New Features US

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# New Features for Blackbaud Altru 5.18

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

## Email Tickets from Advance Sales

To save your organization time and resources, you can now email patrons their tickets when you complete orders through Advance Sales! Previously, the option to email tickets was only available for Online Sales.

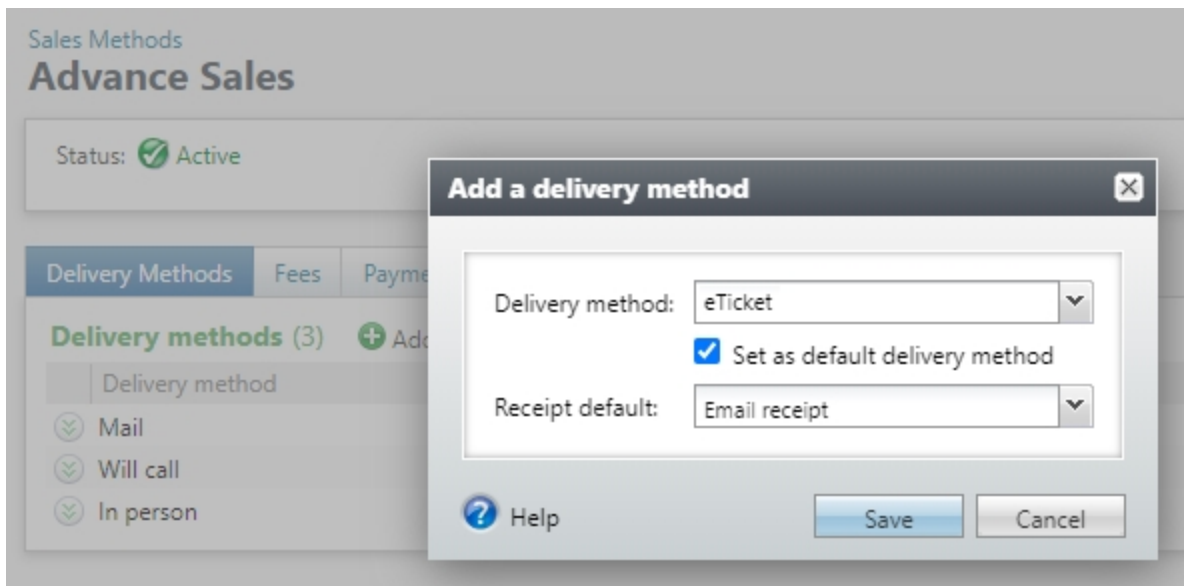
### ➤ Enable eTickets for Advance Sales

**Note:** To enable this option, you must have at least one delivery method — such as eTicket — configured to email tickets upon completion of order. If your organization sells tickets through web forms, it's likely this is already configured. Otherwise, you can add a new delivery method. For more information, see [Delivery Methods](#).

From *Tickets*, select **Sales methods**, then select **Advance Sales**. Under **Delivery methods**, select **Add**.

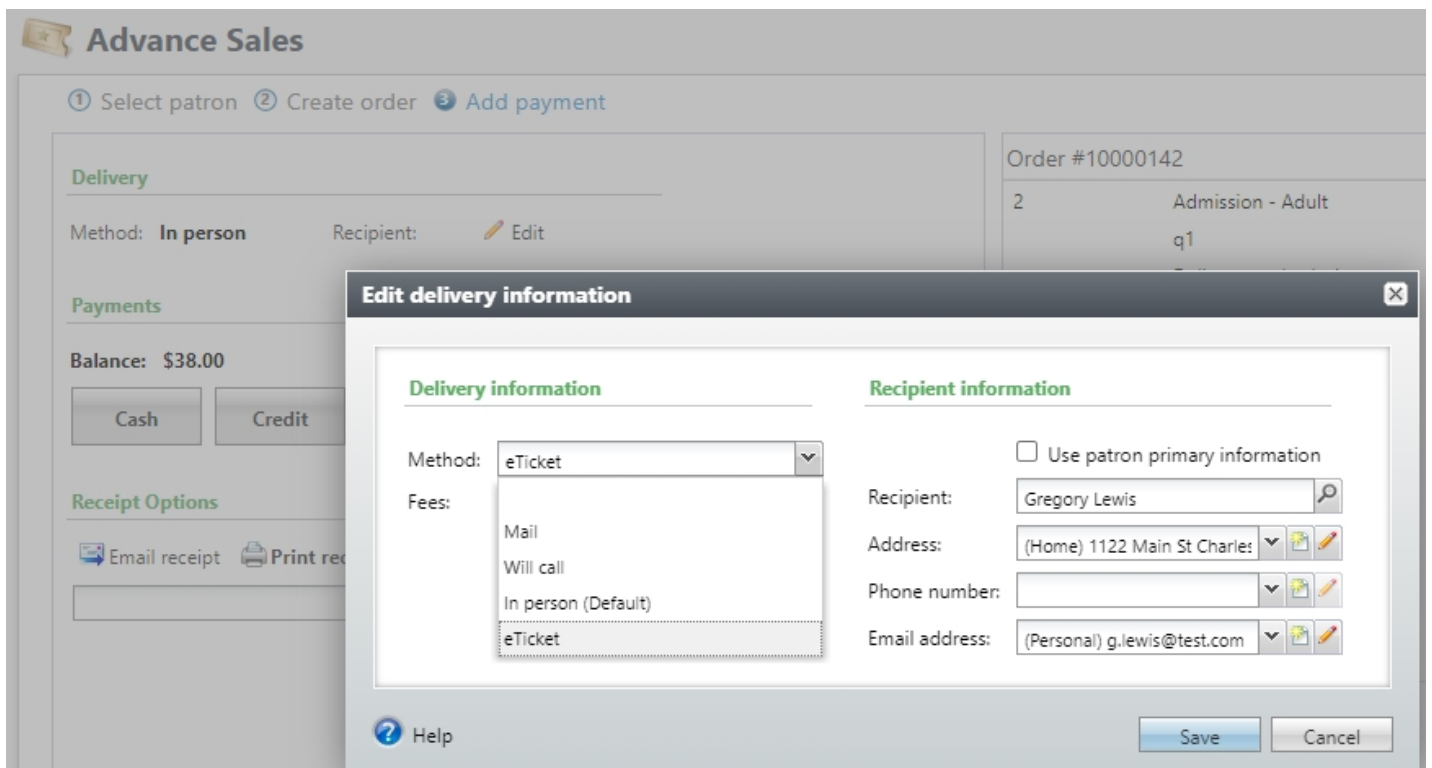
On the **Add a delivery method** form, select the **eTicket** delivery method (or any delivery method configured to email tickets). If your organization plans to send a majority of tickets via email, you can set it as the default delivery method.

Choose a receipt default, then **Save**.



### ➤ Email Tickets from an Advance Sales Order

After you enable the eTicket delivery method, it appears as an option under Delivery information on the **Add a payment** step of the Advance Sales order.



When you select **eTicket**, the recipient information automatically defaults to the patron's primary email address. You can add or select a different email address if necessary.

For anonymous orders (those without a selected patron), you must add recipient information. You can select an existing constituent record or add a new record.

When you complete the sales order, an email is automatically sent to the patron with a link to the eTickets page. Settings for the email and eTickets page are shared between Advance Sales and Online Sales. To manage page settings, from *Web*, select **eTickets**. For more information, see [Design eTickets Page](#).

## Resend Acknowledgement Emails

You can now resend acknowledgement emails to patrons who donated or made purchases through your web forms. For example, if a patron incorrectly entered their email address, or misplaced an email with important details about an upcoming event, you can send them a copy of the original acknowledgement email.

From the sales order, click **Email acknowledgement** under **Tasks**. The Send email acknowledgement screen appears.

Under **Email**, choose which of the patron's email addresses to use. Or you can click **Add email** to add a new email address to the patron record.

The screenshot displays the Blackbaud Altru interface for a sales order. On the left, a 'Tasks' sidebar lists various actions, with 'Email acknowledgement' highlighted in a yellow box. A dashed orange arrow points from this task to a modal dialog box titled 'Send email acknowledgement'. The dialog box features an 'Email:' dropdown menu showing 'g.lewis@test.com' and a '+ Add email' button. At the bottom of the dialog are 'Send' and 'Cancel' buttons. The background shows the order details for Gregory Lewis, including the order number 10000547 and a total of \$45.00.

**Note:** The emailed acknowledgement is always a copy of the original email and will not reflect any changes to the order, such as discounts or refunds, since the initial sale.

## Capture More Details with Attribute Form Extensions

To help you track additional details throughout various forms and pages in **Blackbaud Altru**, you can now create attribute form extensions. Form extensions add tabs or sections to forms and pages that otherwise don't include attribute fields.

For example, you can create an attribute category to track constituents' pronouns — such as "she, her, hers" or "they, them, theirs" — and use a form extension to show this field in a new section on the **Add an individual** form. When you enter details about a new constituent, you can quickly add their pronouns, too.

### ➤ New System Role: Attribute Form Extensions

Use this system role to give selected users the ability to access and manage attribute form extensions. Users in this role can add, edit and delete form extensions.

### ➤ Create a New Attribute Category and Attribute Form Extension

Before you create a new form extension, create the attribute you want to appear. In this example, we'll create a new *Pronouns* attribute, then add a form extension so that it appears on the Add an individual form.

#### Step 1: Create a new attribute category

1. From *Administration*, select **Attribute categories** under **Data**.
2. Select **Add**.
3. Enter a name for the attribute category, such as *Pronouns*.
4. Under **Record type**, select **Constituent**.
5. Under **Data type**, select **Code table**.
6. Under **Code table**, choose to create a new code table. The Add a code table form appears.
7. Complete all required fields, then **Save**. For more information, see [Create a code table](#).

**Note:** For the pronouns attribute, the following code table settings are recommended:

8. On the Add an attribute category form, select **Allow only one per record**.
9. When finished, select **Save**.

### Step 2: Add values to the code table

From *Administration*, **Code tables**, open the **Pronouns** code table and add values. This step is only necessary for attributes that use a code table, such as the example above.

Description	Active
he, him, his	Yes
she, her, hers	Yes
they, them, their	Yes
ze, zir, zirs	Yes

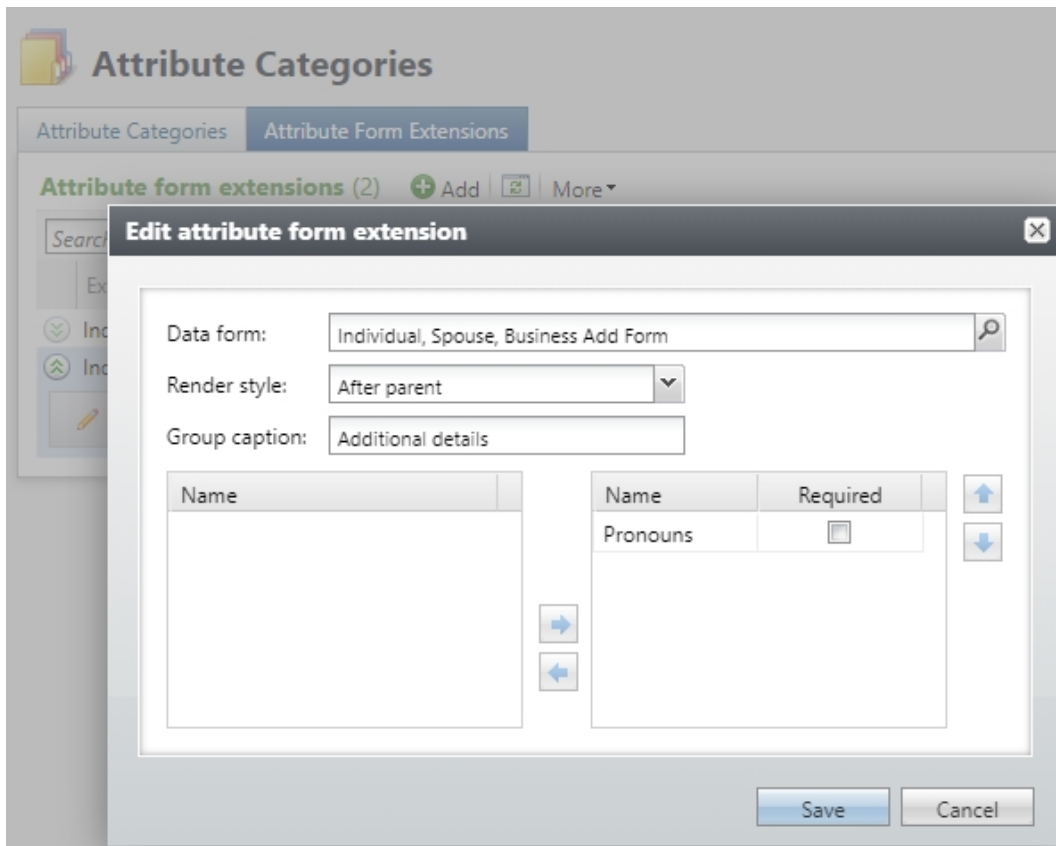
**Note:** This example includes a few common pronouns but is by no means a complete list.

### Step 3: Create a new attribute form extension

After you create the attribute (and its corresponding code table, if necessary), create a new attribute form extension. This adds a new tab or section to Add and Edit forms where the attribute will appear. In this example, we'll create a new section on the Add an individual form.

1. From *Administration*, select **Attribute categories** under **Data**.
2. Select the **Attribute Form Extensions** tab.
3. Select **Add**.
4. Under **Data form**, select **Individual, Spouse, Business Add Form**.
5. Under **Render style**, select **After parent**.
6. Under **Group caption**, enter a title, such as *Additional details*.

7. To include the *Pronouns* attribute in this new section, move it into the column on the right.
8. Select **Save**.



Now, the attribute appears in a new section on the Add an individual form.



To show this attribute when you edit a constituent's personal information, repeat the steps to create a new attribute form extension. Under **Data form**, select **Individual Biographical Edit Form 3**, and add the pronouns attribute.

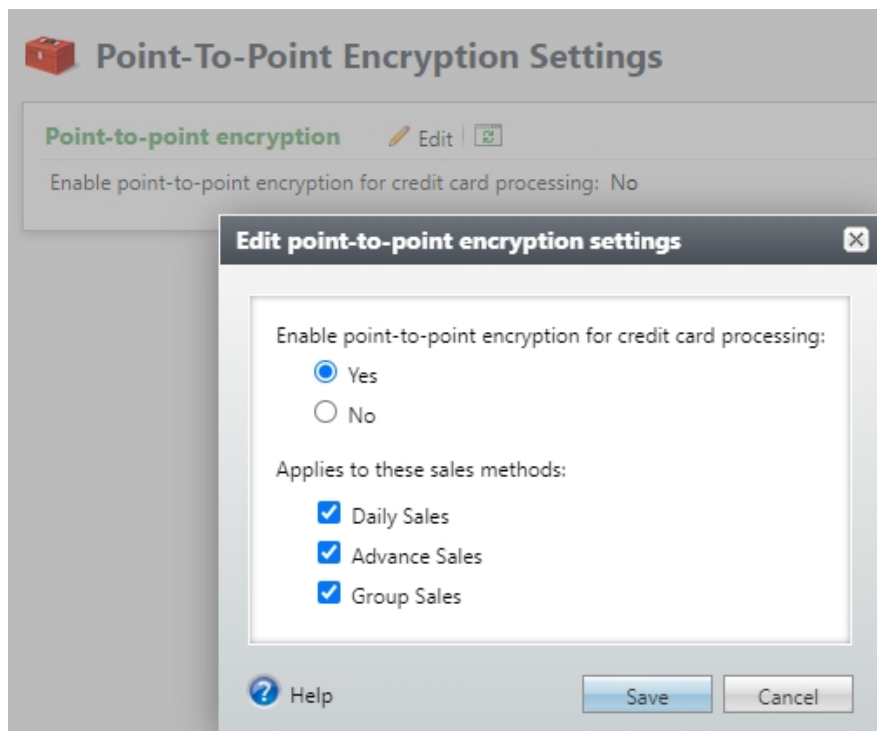
**Note:** While this example shows how to add an attribute to the constituent Add and Edit forms, attribute form extensions can be used on a variety of forms and pages. For more information, see [Add Attribute Form Extensions](#).

## Point-to-Point Encryption (P2PE) for Group Sales

Earlier this year, we introduced point-to-point encryption for credit card payments entered in Daily Sales and Advance Sales. Now you can enable this feature in Group Sales.

**Note:** P2PE is available to organizations who process credit card payments through **Blackbaud Merchant Services (BBMS)**. The P2PE solution is offered through Blackbaud's partnership with Bluefin, a leading provider of payment security solutions. To learn more, visit our [Point-to-Point Encryption \(P2PE\) assistance and resources page](#). To sign up for the solution, visit <http://www.bluefinpartner.com/blackbaud>.

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.

## Streamlined Digital Wallet Settings

We made a small change to the way you enable digital wallet payments for web forms. From **Web Payment Settings** under *Web, Configuration*, you now select **Include digital wallets** to accept payments from ApplePay, Masterpass, and Visa Checkout. Previously, you needed to enable each payment method individually.

If you had one or more digital wallets enabled before this release, **Include digital wallets** is selected automatically.

**Note:** Don't see this option? Digital wallet payments 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>.