

# New Features Guide

05/01/2015 Blackbaud Altru 4.3 New Features US

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NewFeatures-2015

# New Features for Blackbaud Altru 4.3

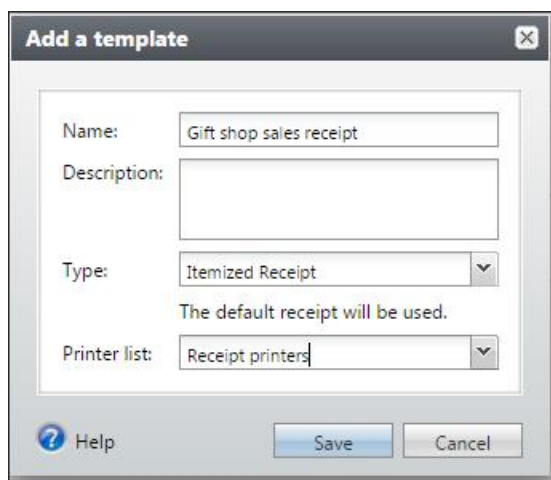
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Before you use the new **Blackbaud Altru** features released in June 2015, we recommend that you review the information in this guide. It will help you and any other **Altru** users in your organization get the most from the enhancements we introduced.

## Itemized Sales Receipts

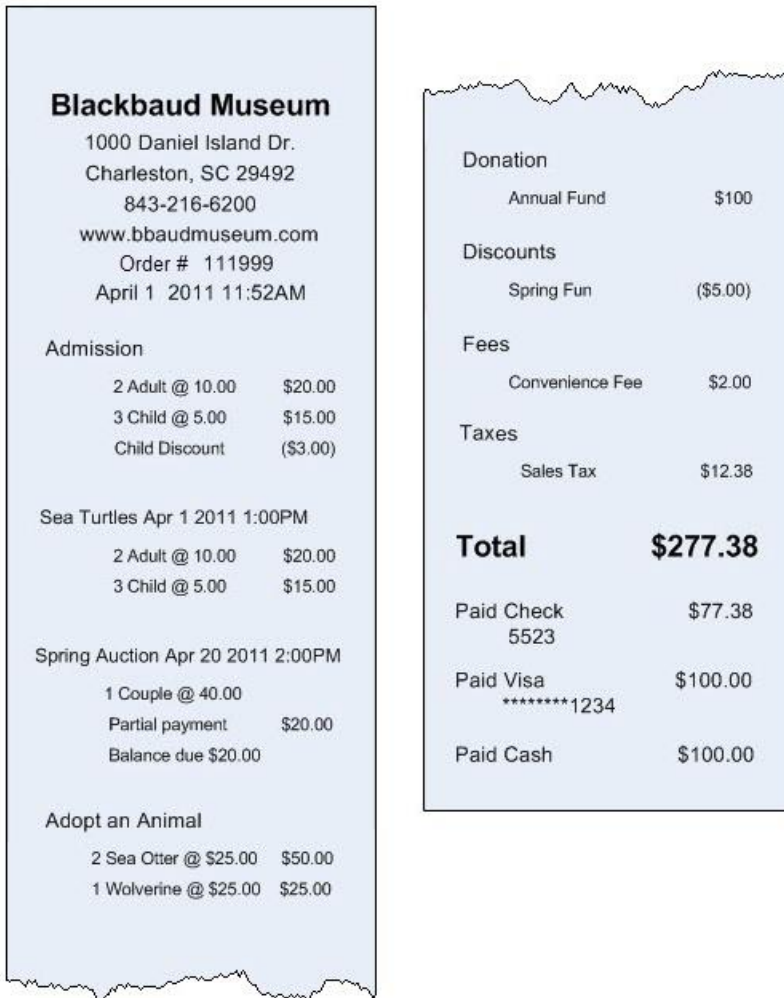
Itemized sales receipts are now based on Scalable Vector Graphics (.svg ) files to enable faster printing. The program provides a default predefined sales receipt that is not editable.

When you add an itemized receipt template from the Sales Document Templates page in *Tickets*, you longer choose a report file in the **Report** field. The default .svg file is used for all itemized receipt templates. You still configure printer lists and printing rules for each itemized receipt template you add.



We also made minor changes to the itemized receipt's design:

- The receipt now displays the order's transaction date rather than the date the receipt is printed.
- The receipt uses the designation's public name rather than the name of the full designation hierarchy.
- The receipt no longer includes a zero balance. A balance is printed only when it is over zero.
- We removed "Thank You!" from the bottom of the receipt.
- An **Order #:** label now appears next to the order number.



## Manually Mark Gifts as Acknowledged

In previous versions, if you sent a personal note to a donor or thanked them in person, there was no way to mark their revenue as acknowledged without generating an acknowledgement letter.

Now you can manually mark payments and pledges as acknowledged. From a payment or pledge record, under **Tasks**, click **Mark acknowledged**.

**Note:** The **Mark acknowledged** task appears only for payments and pledges that have not been acknowledged yet and are not marked "Do not acknowledge."

The screenshot shows the Blackbaud Altru interface for a payment entry. On the left sidebar, under the 'Tasks' section, the 'Mark acknowledged' option is highlighted with a red circle. The main content area displays a transaction summary for 'Reggie Abrahms' with a payment amount of \$500.00 on 4/14/2015. The status is 'Not acknowledged', which is pointed to by a red arrow. Below the summary, there are tabs for 'Details', 'Benefits', 'Matching Gifts', 'Letters', 'Documentation', 'GL Distributions', and 'Tributes'. The 'Details' tab is active, showing fields for 'Original amount', 'Finder number', 'Inbound channel', 'Effort', and 'Appeal'.

The Mark Payment as Acknowledged screen appears. The **Acknowledgee** and **Acknowledge date** default from the payment, but you can update those as needed.

The dialog box titled 'Mark Payment as Acknowledged' contains two input fields. The first field, labeled 'Acknowledgee', has the text 'Reggie Abrahms' and a search icon. The second field, labeled 'Acknowledge date', has the text '4/14/2015' and a calendar icon. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

When you save the manual acknowledgement, the status displays "Acknowledged" and the Letters tab includes a revenue letter labeled "Manual Acknowledgement."

Reggie Abrahms  
**4/14/2015 Payment: \$500.00**

Transaction summary

Payment amount: \$500.00      Date: 4/14/2015  
 Receipt amount: \$500.00      Batch number:  
 Gift fees: \$0.00      Revenue ID: rev-10004275

**Status**      **Payment method**

Acknowledgements: Acknowledged      Payment method: Check  
 Acknowledged date: 4/14/2015      Check number: 1234  
 Post status: Not posted      Check date:  
 Post date: 4/14/2015  
 Post process ID:

Details   Benefits   Matching Gifts   **Letters**   Documentation   GL Distributions   Tributes

Letters (1)   + Add tribute letter   More

Type	Letter	Process date	Acknowledge d...	Acknowledgee
Revenue	Manual Acknowledgement		4/14/2015	Reggie Abrahms

If you need to undo the acknowledgement, you can click **Mark not acknowledged** under **Tasks** or delete the letter from the Letters tab.

**Note:** You cannot manually acknowledge sales orders. If you manually acknowledge a pledge, its associated payments are not included. You must acknowledge the payments separately.

## Gift Fields on Membership Web Forms

New gift fields appear on the membership web form. When patrons purchase gift memberships online, they can enter the recipient's information 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.

**Children's Museum**  
*Engaging Minds, Inspiring Ideas*

ABOUT VISIT US GET INVOLVED NEWS AND CALENDAR SHOPPING CART

## Family memberships

**Membership**  
Select your membership options.

**Family, No children**  
For 2 adult families with no children under 12

Family, No children  
**1 year**  
**Free**

**Family, 4 children**  
For 2 adults plus max of 4 children

Family, 4 children  
**1 year**  
**\$100.00**

**Family, plus 2 guests**  
For 2 adults, 4 children, plus 2 guests (child or adult)

Family, plus 2 guests  
**1 year**  
**\$250.00**

**Registration**  
Enter the names to include on the membership.

This membership is a gift

**Gift information**

Send renewal notice to

Deliver membership to

This gift is from

Gift message

**Recipient information**

**Primary member:**

First name:  \*

Last name:  \*

Country:  \*

Address:  \*

Phone:

You can customize gift field labels on the membership form.

Blackbaud Internet Solutions - Blank Client Site - Google Chrome

ptr37.pdnt.blackbaud.com/netcommunity/adminpage.aspx?hbc=1&hbcmd=1&hbcmdweb=1&md=1&rl=False

Design Language

Specify any part text to be replaced with alternate text for a specific language.

Category: Gift information Language: English (United States)

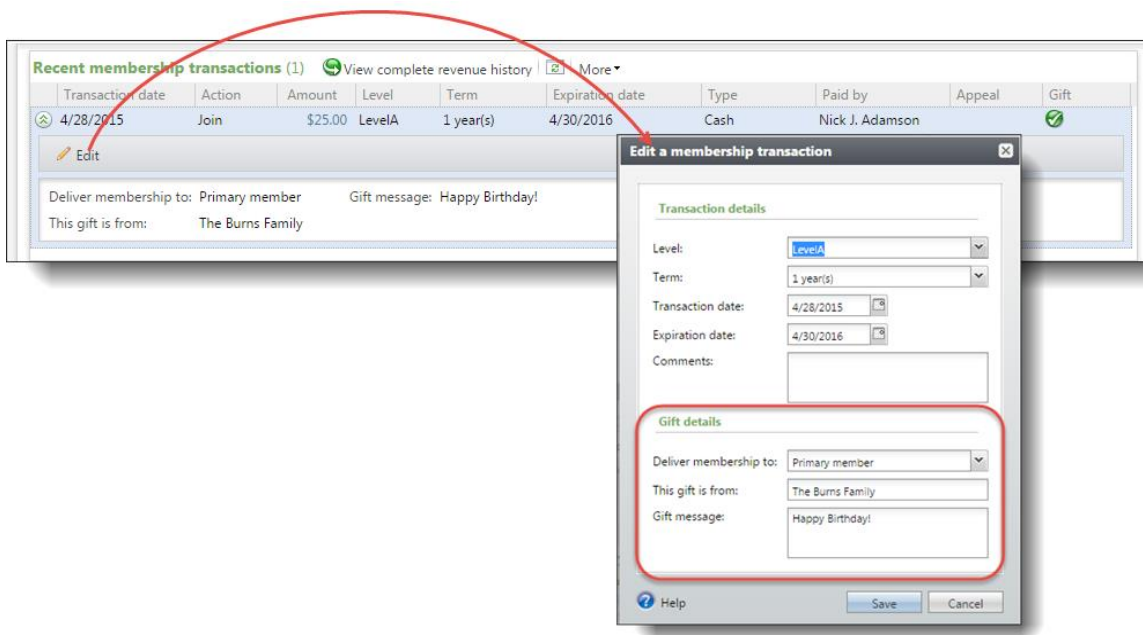
Item name	Item type	Default text	Text
Gift checkbox	Field label	This membership is a gift	<input type="text" value="This membership is a gift"/>
Gift delivery option 1: Recipient	Field label	Gift recipient	<input type="text" value="Gift recipient"/>
Gift delivery option 2: Gift giver	Field label	Myself	<input type="text" value="Myself"/>
Gift delivery options	Field label	Deliver membership to	<input type="text" value="Deliver membership to"/>
Gift from	Field label	This gift is from	<input type="text" value="This gift is from"/>
Gift heading	Field label	Gift information	<input type="text" value="Gift information"/>
Gift message	Field label	Gift message	<input type="text" value="Gift message"/>
Recipient heading	Field label	Recipient information	<input type="text" value="Recipient information"/>
Renewal option 1: Recipient	Field label	Gift recipient	<input type="text" value="Gift recipient"/>
Renewal option 2: Gift giver	Field label	Myself	<input type="text" value="Myself"/>
Renewal option 3: Both	Field label	Both	<input type="text" value="Both"/>
Renewal options	Field label	Send renewal notice to	<input type="text" value="Send renewal notice to"/>

Save Cancel

When the membership is saved, gift information is stored on the membership record under **Recent membership transactions**. You can add or edit gift information as needed.

**Note:** Gift detail fields are not available when memberships are sold as gifts in daily or advance sales. If the membership is specified as a gift at the time of sale, you can add gift information to the transaction at a later time.





Membership queries include the new gift fields. You can export this information to use in letters to the member. For example, you can include the giver's personal message.

