New Features Guide

11/19/2020Blackbaud Altru 4.9 New Features US

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New Features for Blackbaud Altru 4.9

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Before you use the new ***Blackbaud Altru*** features released in May 2016, 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.

Credit Card Updater Service

Sustained (or recurring) giving is vital to the long-term financial health of your organization. Once you engage valuable sustaining donors, it is critical to keep information about your recurring donors current - from contact details to credit card information.

With this release, we introduce ***Blackbaud Merchant Services***™ Credit Card Updater - a subscription service that helps you maintain accurate credit card data for your recurring giving. With Credit Card Updater, you can:

- Avoid declined transactions and disruptions in recurring payments for pledges and recurring gifts.
- Reduce time spent contacting donors to update card information.
- Reduce cancellations of recurring gifts.
- Keep donor's credit card information current.
- Save donors' time by proactively receiving updates.

Note: To use Credit Card Updater, you must process credit card payments with ***Blackbaud Merchant Services***.

Blackbaud Merchant Services partners with the following major credit cards to provide Credit Card Updater for ***Altru*** clients:

- Visa® Account Updater
- MasterCard® Automatic Billing Updater
- Discover® Network Account Updater

When your organization subscribes to Credit Card Updater, credit card data for your recurring giving is analyzed each month to identify expired or out-of-date credit card information. Credit Card Updater provides new card numbers and expiration dates when available.

Warning: Credit Card Updater applies only to cards issued by participating financial institutions. Credit cards issued by smaller, local banks and credit unions may not update.

To successfully use Credit Card Updater, your organization must adhere to the following criteria: First, your organization must have an active ***Blackbaud Merchant Services*** account. Second, your ***Blackbaud Payment Services*** account must be associated with an address with a supported ***Blackbaud Merchant Services*** currency. Finally, Credit Card Updater must be enabled. For information about subscribing to Credit Card Updater, see Automated Credit Card Updater or review KB66711.

Credit Card Updater affects several areas in the program including *Query* and *Revenue*.

Enable/Disable Credit Card Updater

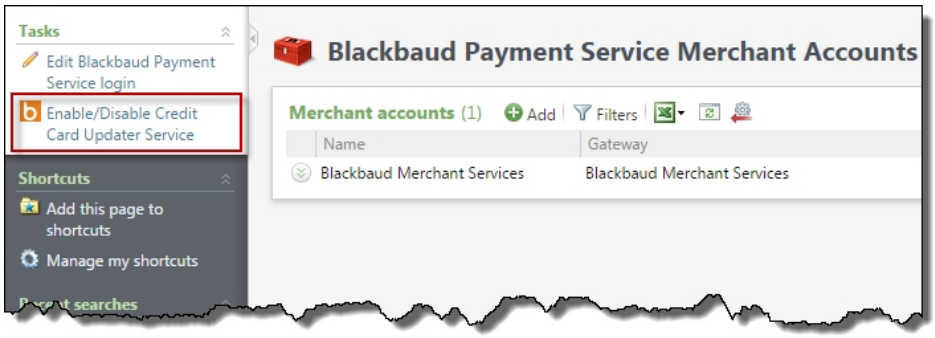
Once you subscribe to Credit Card Updater from ***Blackbaud Merchant Services***, you must enable it in ***Altru***. Note that your organization must have at least one active ***Blackbaud Merchant Services*** account.

Warning: Credit Card Updater should be enabled *only* in your Production environment. You should not attempt to test in Staging, Development, or other non-Production environments. Credit Card Updater has no test mode as it updates your live credit card data, and is unrelated to your ***Blackbaud Merchant Services*** test mode. Enabling in non-Production environments may cause cards that should register to deregister and vice versa. Ensure that Credit Card Updater is enabled *only* in your Production environment.

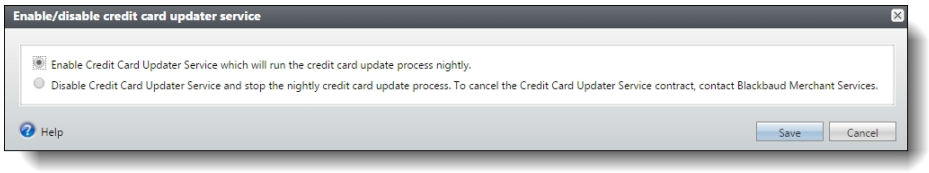
After you refresh a non-Production environment, immediately ensure that Credit Card Updater is set to disabled in the refreshed, non-Production environment to prevent the business process from running at night.

To enable Credit Card Updater, from the Blackbaud Payment Service Merchant Accounts page in *Revenue*, click **Enable/Disable Credit Card Updater Service** under **Tasks**.

Tip: Users with rights to enter/edit ***Blackbaud Payment Service*** credentials also have rights to enable/disable the credit card updater service.



The Enable/disable credit card updater service screen appears where you can select to enable the Service.



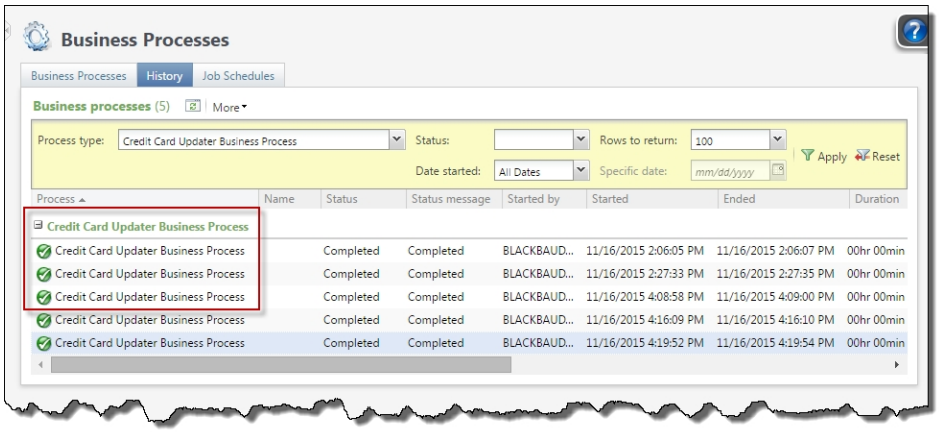
- When you select to enable the Service, the "Credit Card Updater" business process is automatically created. This process, which runs nightly, registers and deregisters cards in ***Altru***.

  When updates are made to credit cards associated with pledges, and recurring gifts, the **Credit Card Updated** field appears on the record and displays the month and year that the card information was updated. You can use the "Credit Card Updates" query to help you track changes made by the Service.
- When you select to disable the Service, the "Credit Card Updater" business process no longer runs nightly. To cancel the Service contract, contact ***Blackbaud Merchant Services*** at bbms@blackbaud.com.

Credit Card Updater Business Process

When you subscribe to Credit Card Updater, ***Blackbaud Merchant Services*** generates batches of credit card information to analyze for updates each month. If updated credit card information exists, ***Blackbaud Merchant Services*** automatically updates the information in ***Altru*** while original payment details are retained.

After you enable Credit Card Updater from the Blackbaud Payment Service Merchant Accounts page in *Revenue*, the "Credit Card Updater" business process is automatically created and scheduled to run nightly. To view details about processes as they run, from the Business Processes page in *Administration*, click the History tab. From the **Process type** field, filter by "Credit Card Updater Business Process."



Tip: The **Number of records processed** and **Total count** columns represent the number of records processed. These numbers include records updated and not updated by an individual instance of the process.

Blackbaud Merchant Services returns credit card updates once per month in a 10-day window (typically the 10th through 20th of each month). When updates are available and retrieved from ***Blackbaud Merchant Services***, credit card information is updated in ***Altru***. When updates occur, an email is sent to users who elect to receive email notifications through the ***Blackbaud Merchant Services*** web portal.

Tip: In the ***Blackbaud Merchant Services*** web portal, you can set email notifications by clicking **My User Settings**, **Email Notifications**.

To review statuses of business processes as they run, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when business processes complete or do not finish. To subscribe to the RSS feed, click **More**, **View RSS feed**.

Warning: You cannot edit the business process or add it to a queue for processing.

What does the business process register?

The business process registers new information for credit cards on file for at least one active, multi-installment revenue commitment paid automatically by a credit card. The following revenue types are included in the business process:

- Recurring gifts with Active, Held, or Lapsed statuses
- Pledges paid in installments with a non-zero balance

Note: If you have more than one revenue commitment, such as a pledge or recurring gift, with the same credit card and at least one of them is included in the Credit Card Updater process, all of the revenue records with that credit card will be updated with the updated card information regardless of the status of the commitments. For example, a canceled recurring gift would still receive updated card information if the same card was used on another active revenue commitment. The Credit Card Updater process charges by the number of unique credit cards updated, not by the number of revenue records that are updated. In this case, your organization is charged for one updated card even though multiple revenue records are updated.

Warning: The initial registration of credit cards may cause the process to run slightly longer.

What does the business process deregister?

The business process deregisters previously registered credit cards to ensure they are no longer eligible for updates when:

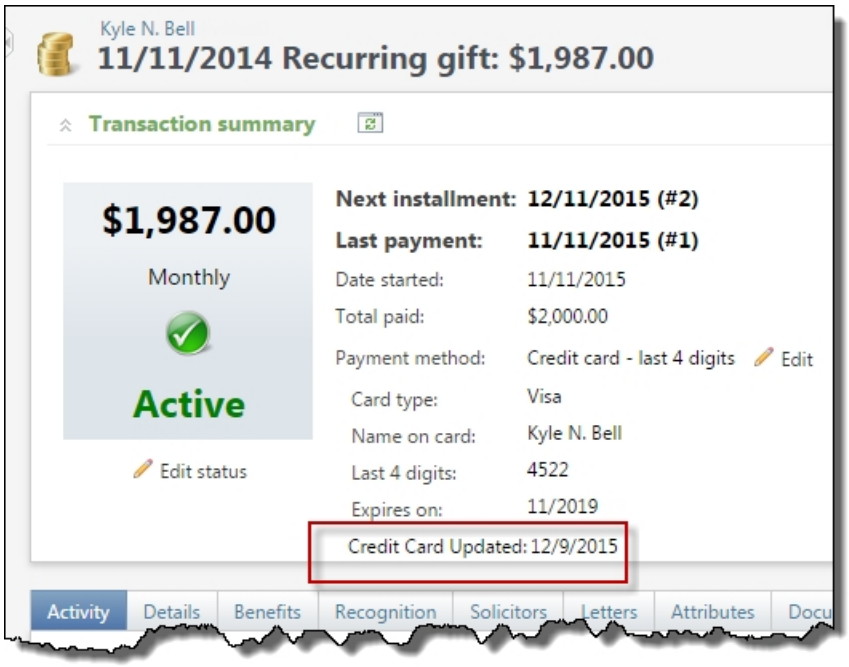
- A credit card is manually updated to remove the existing credit card information and is manually replaced with completely new card information. In this case, the existing card is deregistered and the new card will be eligible for registration in the business process during the next update.
- A recurring gift status changes to Terminated or Canceled.
- A pledge balance changes to zero.

Note: For new commitments manually entered through *Batch*, the business process does not consider or process credit card information until the batch is committed.

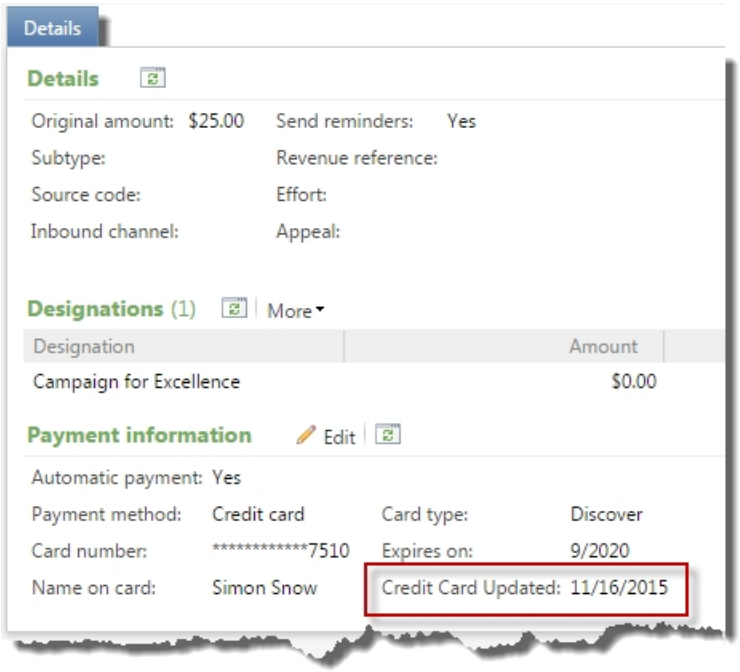
Revenue Records

When Credit Card Updater updates pledges and recurring gifts, the **Credit Card Updated** field appears and displays the month and year that the credit card information was updated.

For recurring gifts, the field is reflected in the **Transaction summary** section.



For pledges, the field appears on the Details tab.

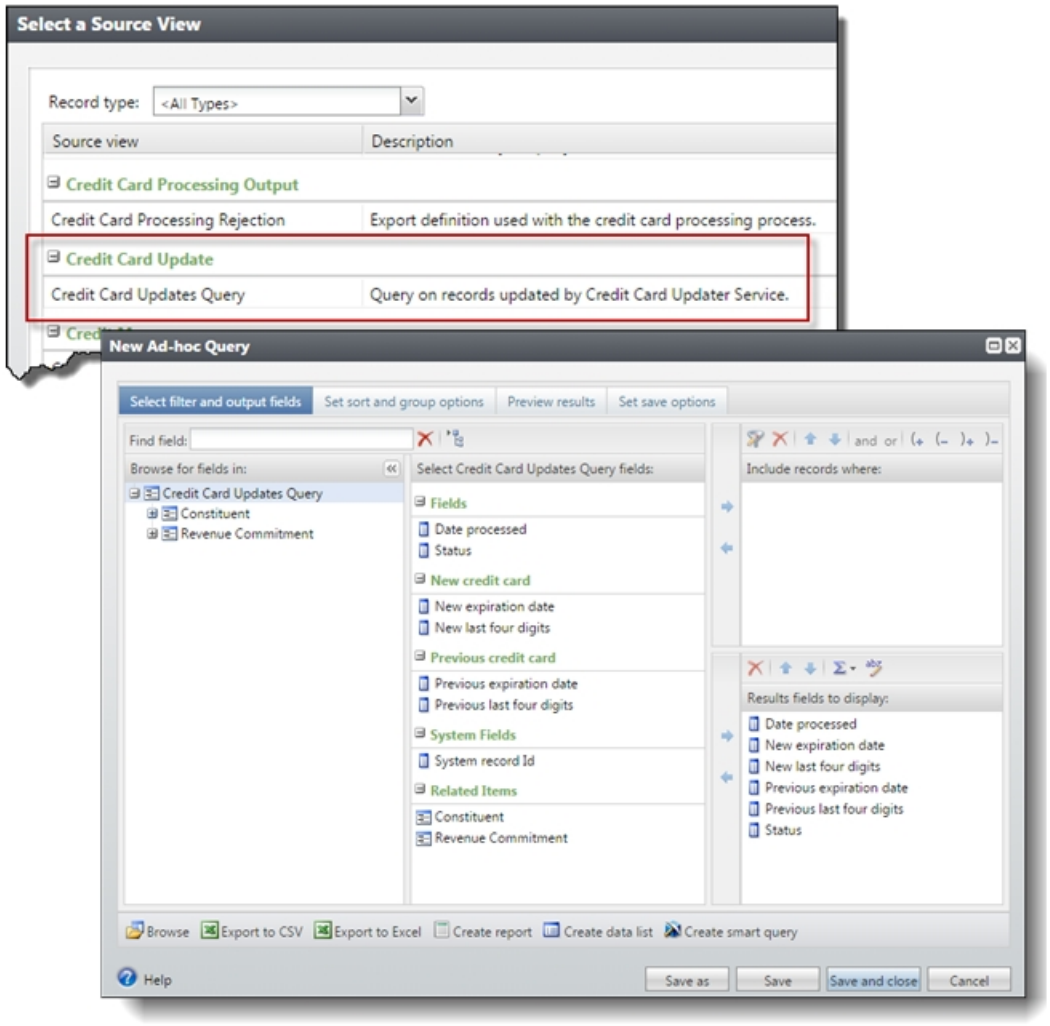


When no update is available for a credit card, the **Credit Card Updated** field does not display. To locate revenue records associated with non-updated credit cards, we recommend you run the "Credit Card Updates" query and set the **Status** to equal "Not updated."

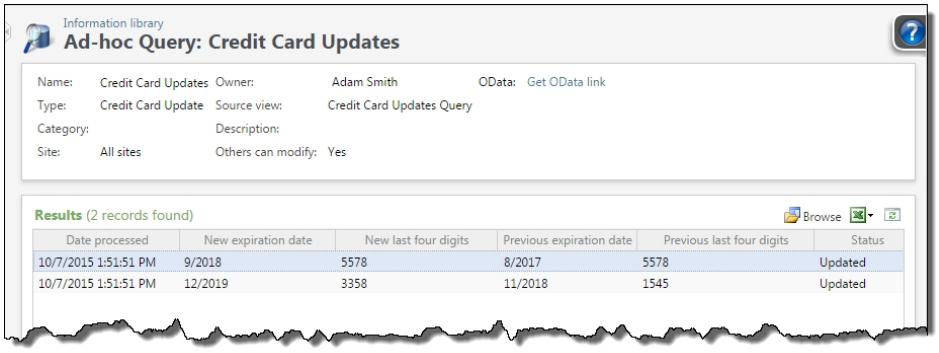
Tip: In some cases, you may need to manually update credit card information after the business process runs. For example, a donor calls your organization to provide a new expiration date which requires you to manually update the card's expiration date in the program. When this occurs, the manual edit you make on the revenue record overrides the last update made by the business process. At this point, the program removes the **Credit Card Updated** field from the revenue record as well as the Credit Card Updates query. The field is added back only when a future update is made by the business process.

Credit Card Updates Query

We added a new "Credit Card Updates" query to help you track changes made by the Credit Card Updater Service. Use fields such as **Date processed**, **Status**, and **New expiration date** as well as various constituent and revenue fields to review the updates.



Query results include details about updated credit cards, as well as previous and new information. When no updates occurred, the status displays "Not updated" and the associated fields are blank.



Tip: To locate revenue records associated with non-updated credit cards, set the **Status** to equal "Not updated."

Responses from Blackbaud Merchant Services

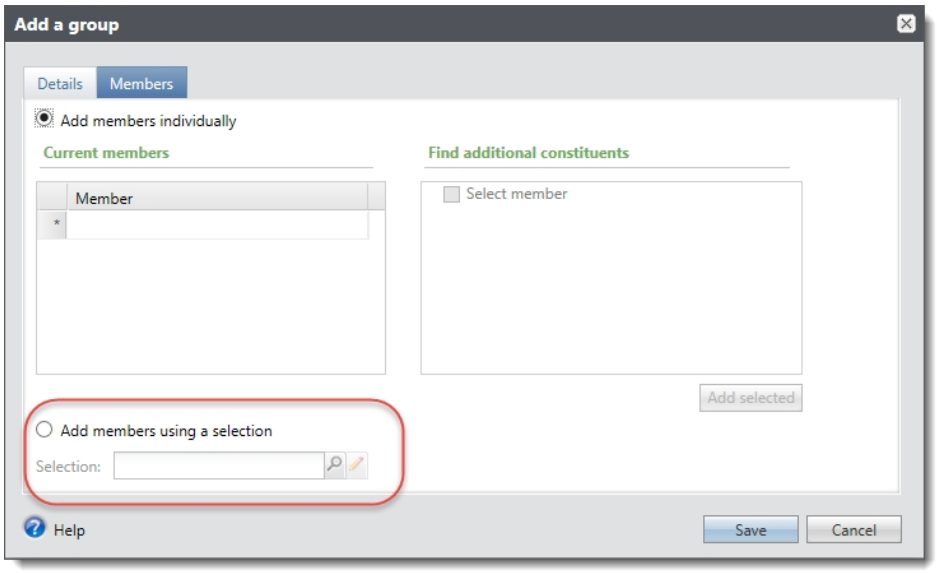
After Credit Card Updater runs, ***Blackbaud Merchant Services*** communicates various responses that trigger credit card information to either update or not update within ***Altru***. These responses are communicated from ***Blackbaud Merchant Services*** to ***Altru***, but do not appear on ***Altru*** revenue records or in *Query*; they serve only as triggers to either update or not update credit card information.

The following responses are examples communicated from ***Blackbaud Merchant Services***:

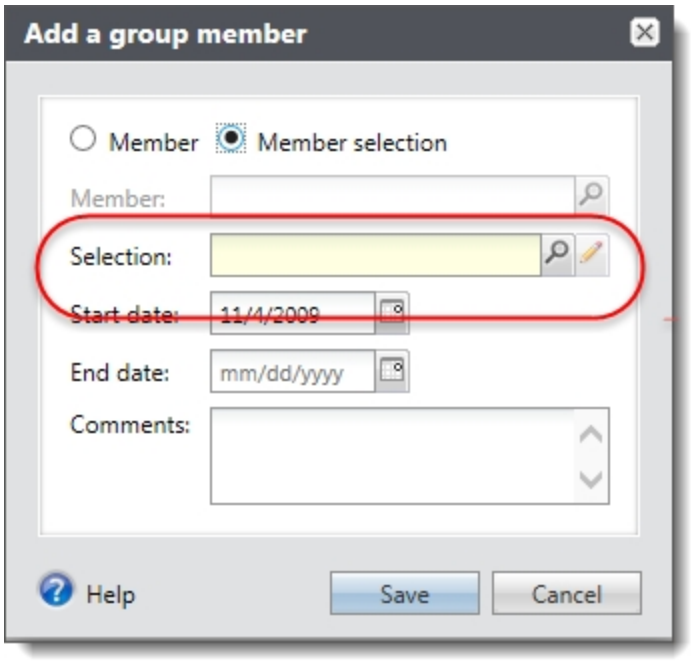
- Bad credit card type code
- Bad check digit value
- Invalid account number length
- Non-numeric account number
- Invalid expiration date
- Merchant not registered
- TransArmor unable to translate token
- Account closed or contact cardholder
- Credit card updated with new expiration date
- Credit card updated with new card number and expiration date

Add Constituents to a Group in Bulk

To improve efficiency with group management, you now have the ability to add multiple constituents to a group at once, rather than just one constituent at a time. When you add a new group, you now have the option to pick a selection of constituents, in addition to selecting individual constituents.



You also have the option to use a selection when you add additional members to an existing group.



Note: These roles have rights to this feature: Annual Fund manager, Development Data Entry, Director of Development, Event Manager, Membership Manager, and Volunteer Manager.

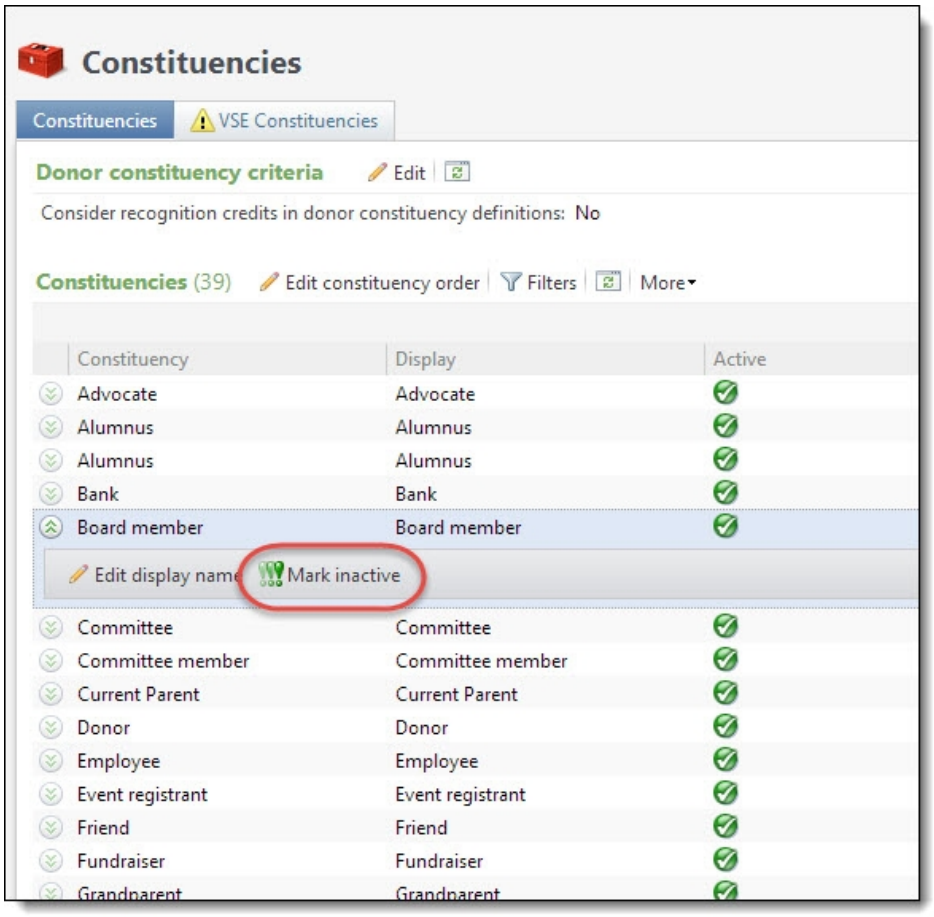
Note: When someone in a selection is already an active member of the group, nothing changes with the group member. When someone in a selection is a previous or inactive member of the group, the constituent becomes an active group member again and start date for the constituent's group membership is reset to the date entered.

Mark Constituencies Inactive

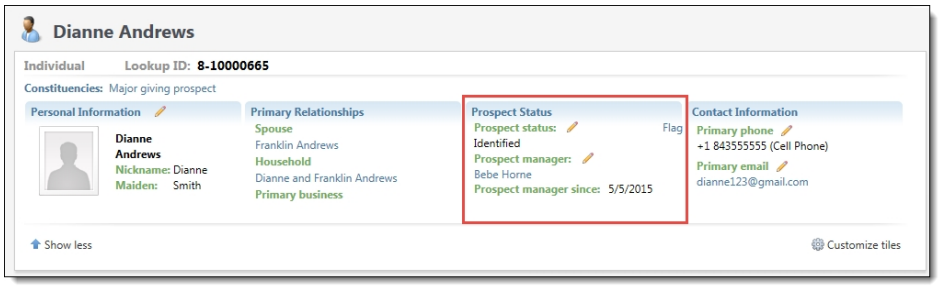
You can now mark constituencies as inactive. Inactive constituencies are not available to assign to constituents and do not appear as filters in queries and reports. When you inactivate constituencies you no longer need, you can improve system performance because processes such as queries do not need to consider data that is no longer relevant to your needs.

When a constituency is marked inactive, it is no longer displayed in the summary section of constituent records.

To manage constituencies, from *Constituents*, click **Constituencies** under **Configuration**. To mark a constituency as inactive, select it and click **Mark inactive**.



Active constituents show a checkmark on the Active column on this page. To reactive an inactive constituency, expand it and click **Mark active**.

Prospect Status Tile on Constituent Records

If you have *Prospects Management*, the constituent record now includes the Prospects Status tile, which summarizes opportunity information for individual constituents who are major giving prospects. You can view and edit a constituent's prospect information from the tile, including the prospect status and the prospect manager. From the Prospect Tile, you can also flag the prospect for tracking purposes.