New Features Guide

11/18/2015 Blackbaud Altru 4.6 New Features US

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New Features for Blackbaud Altru 4.6

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

Responsive Web Form Layouts for Mobile Devices

With this release, we added responsive web form layouts which resize a form's content to fit the resolution of a user's screen. Responsive forms will make it easier for website users to complete tasks from mobile devices. For example, these images show a membership form on a desktop monitor and a mobile phone. The responsive layout shifts the form's fields and options neatly into a row to fit the narrow width of the mobile device and the fonts are larger to make it easier to read. We also made general design improvements. The appearance and behavior of all forms, including the shopping cart and payment pages, are more seamless and consistent.

Register Sign in

Things & Stuff Museum

- Home
- Admission
- Family memberships
- Event Rental
- Donate Now

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

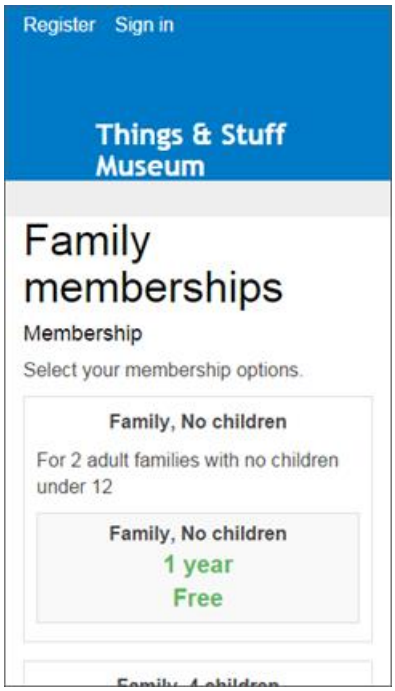
Registration

Enter the names to include on the membership.

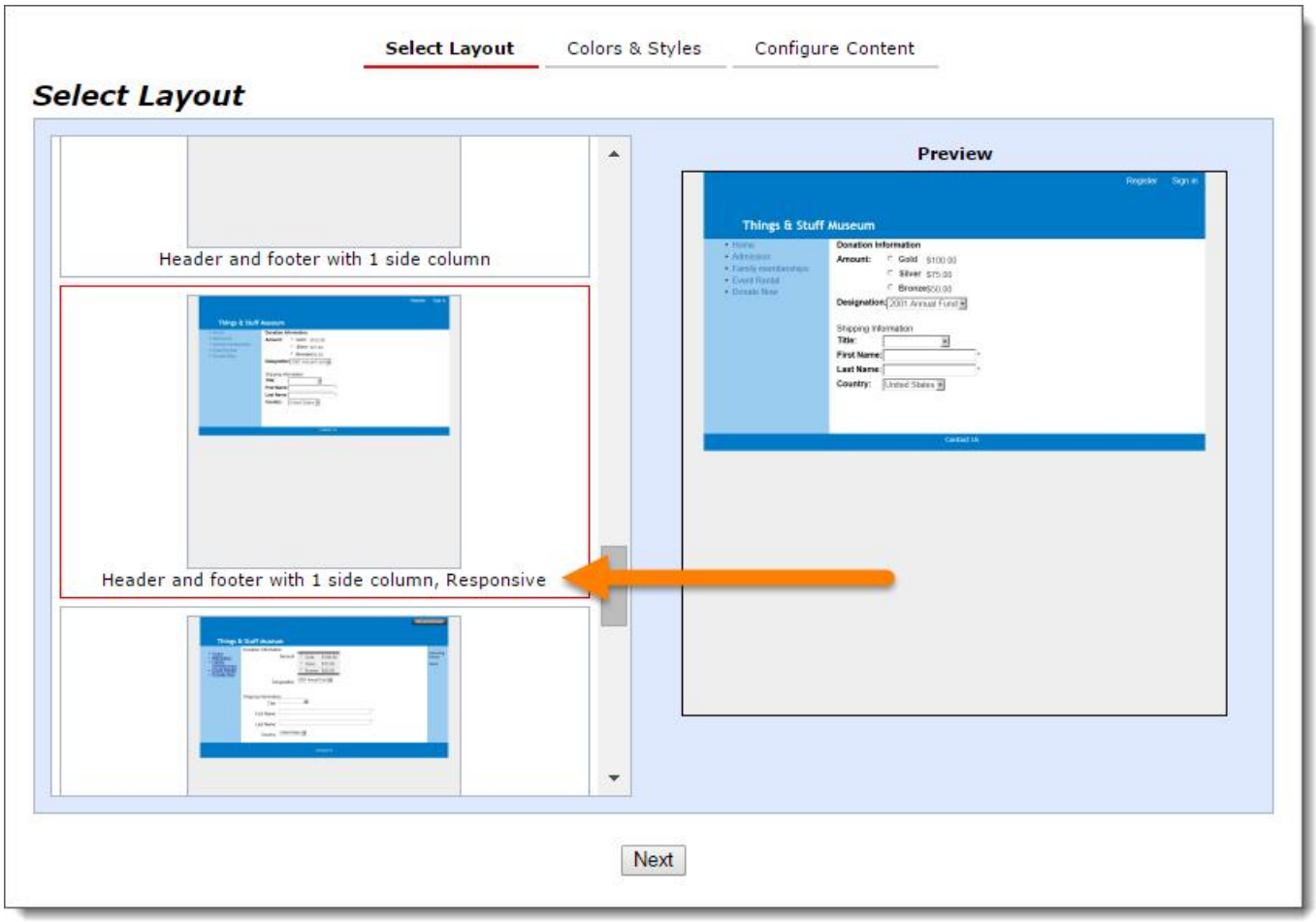
This membership is a gift

Primary member:

First name:*



From *Web*, select **Page designer**. On the Select Layout screen, you will find a new responsive layout for each existing default layout. (They are labeled "Responsive.")



If you currently use a default layout with no changes, you can simply switch to the new responsive version. If you currently use a customized layout or modified sections of your forms with additional styling, when you switch to a responsive layout, you will need to make design changes to match your website. Making these updates requires significant knowledge of HTML and CSS. If you would like assistance, we have resources available that are able to provide customized designs using a new responsive layout. Contact your account manager for professional design assistance.

Warning: Your live web forms will display the responsive layout as soon as you click **Next** on the Select Layout screen in the Page Designer.

We *strongly* recommend that you do the following:

- Back up all areas, including the existing stylesheet.
- Test all design changes in a sandbox or staging environment
- In your production environment, do not click **Next** on the Select Layout screen of the Page Designer until you are 100% ready to go live with your changes.

Tip: When you change to a responsive layout, on the Colors & Styles screen of the Page designer, you must you must change your fonts from points to pixels.

Program Revenue Report

This new report displays the revenue and number of tickets sold for scheduled and daily program events by event date. You can find this report on the Sales page, under Reports.

In the **Event date** field, select the date range of events to include. For scheduled events, the event date is when the program event occurred. For daily admission events, the event date is when the ticket was purchased.

To exclude pay on arrival advance sales, select **Include completed orders only**. In the **Sold date** field, select the date(s) the tickets were sold. The **Sold date** determines which sales and refunds are included.

For example, you have an event scheduled for January:

- In November, you sell $100 in tickets and refund $0.
- In December, you sell $0 in tickets and refund $100.

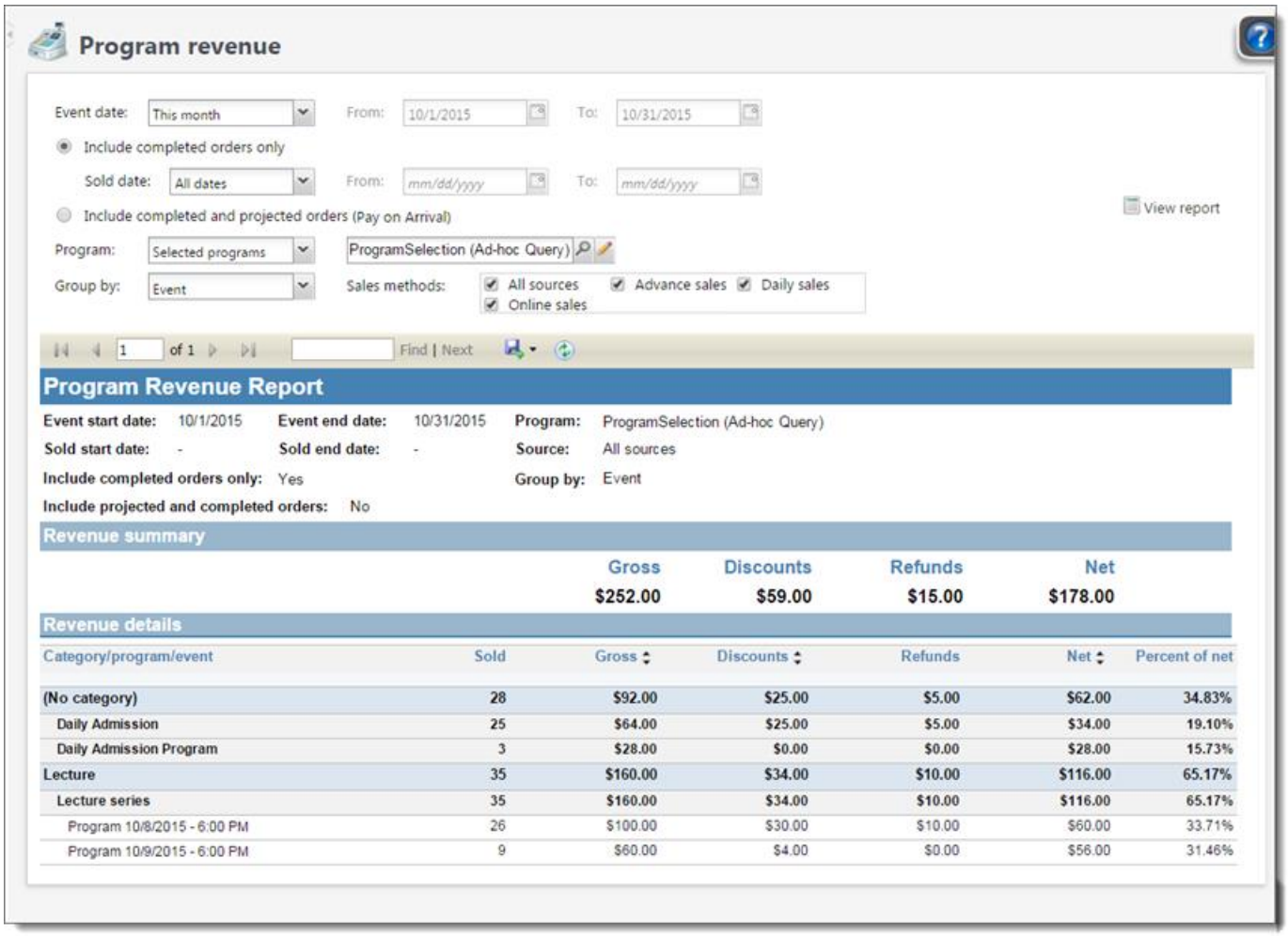
  When you run the report and filter by November in the **Sold date** field, the revenue details for the event are: Gross = $100, Refunds = $0, and Net = $100.

  When you filter by December in the **Sold date** field, the revenue details for the event are: Gross = $0, Refunds = $100, and Net = ($100).

Note: For group sales, refunds do not appear in the **Refunds** column because these refunds are applied to the payment, not the tickets. However, the **Gross** and **Net** columns do reflect the refund amounts.

To include incomplete orders, select **Include completed and projected orders (Pay on Arrival).** The **Sold date** field becomes disabled.

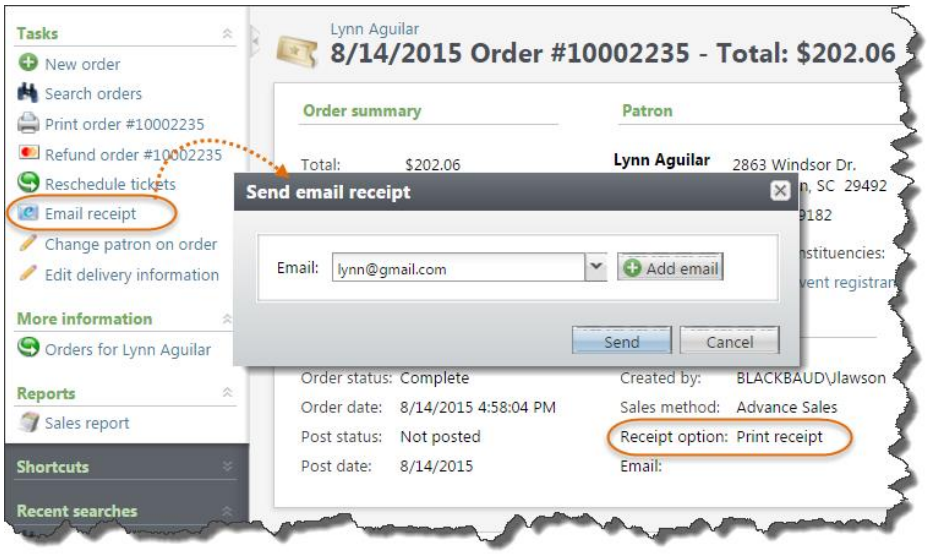
You can filter the report to include all programs, a specific program, or a selected group of programs and choose which sales methods to include. You can also group the results by event and/or price type.



Email Itemized Receipts From Sales Orders

If a patron requests a copy of their itemized receipt, you can now send it by email. From the sales order, click **Email receipt** under **Tasks**. The Send email receipt screen appears.

The **Email** field displays all email addresses saved to the patron's record. Or you can click **Add email** to add a new email address to the patron record. If the original receipt was emailed to a purchaser that is not a patron, the address entered in the email field on the sales order appears here. If you do not have an email address for the purchaser at all, you can enter one in the field.



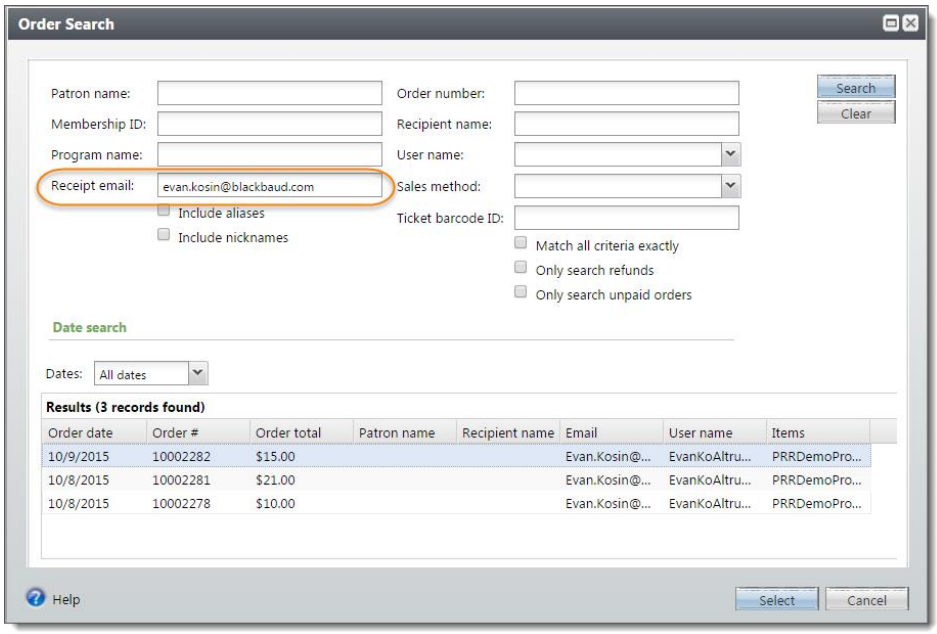
Note: If the sales order was created in *Daily Sales* or *Advance Sales*, the **Receipt option** field in the **General** section displays how the receipt was provided during the initial sale (printed, emailed, or no receipt). If you use the **Email receipt** task to send a copy, the **Receipt option** field does not update. It always displays the original receipt option used.

Also, the emailed receipt is always a copy of the original receipt and will not reflect any changes to the order, such as discounts or refunds, since the initial sale.

Search for Order By Email Address

In the new **Receipt email** field on the Order Search screen, you can search for a sales order by the email address used to send an itemized receipt from *Daily Sales* or *Advance Sales*.

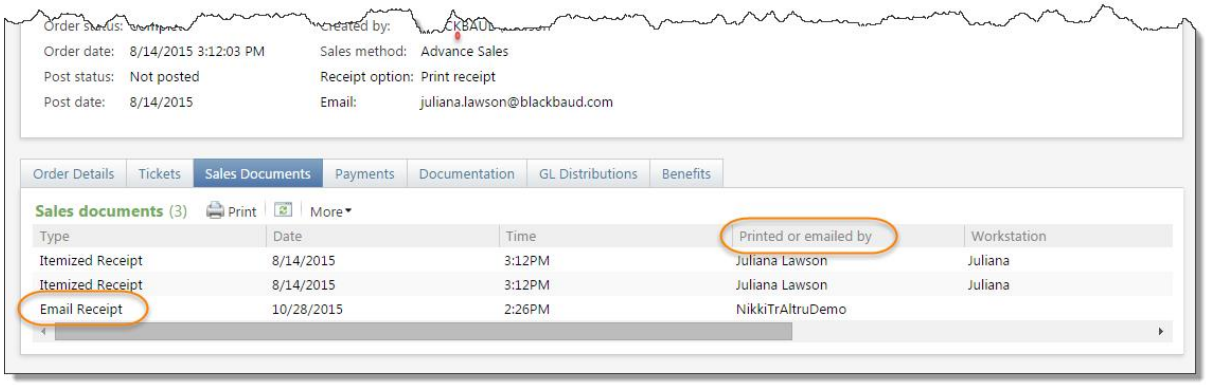
Note: Searching by email does not include online sales orders.



View Emailed Receipts on the Sales Documents Tab

The Sales Documents tab on orders now displays when an itemized receipt was emailed and who sent it. The **Printed by** column was renamed to **Printed or emailed by**.

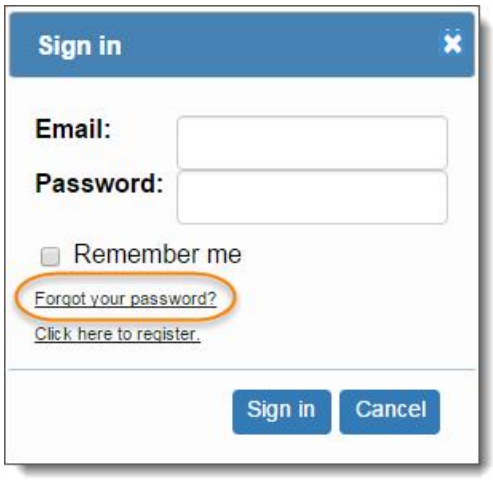
Note: This tab will not include email receipts sent before the 4.6 upgrade.



Improved Password Reset for Website Users

We made the password request process more secure. Previously, when a web form user forgot their password, ***Altru*** sent a plain text email with the user's password. Now, users receive an email with a link to a form where they can securely change their password.

On the Sign in page, the user clicks **Forgot your password?**.



On the Recover Password form, the user enters the email address they used to register.

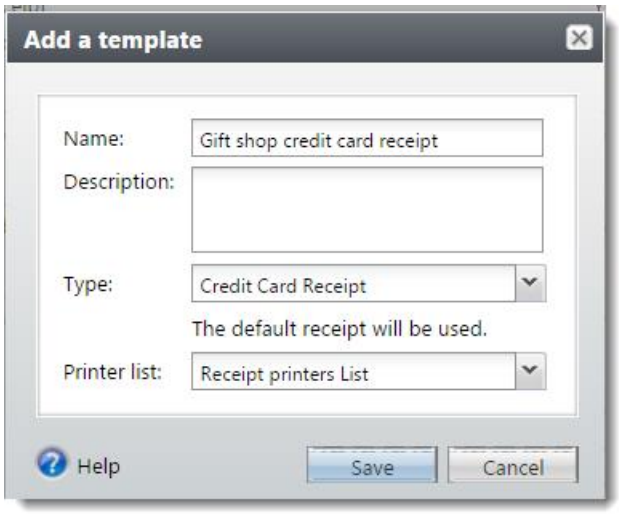
The user receives an email with a link to the Password Reset form.

The user clicks the provided link. On the Password Reset form, the user enters a new password.

Credit Card Receipts

Credit card receipts are now based on Scalable Vector Graphics (.svg) files to enable faster printing. After the upgrade, you will not need to make any changes to your existing credit card receipt template or printing rules to take advantage of these enhancements. You cannot customize the layout of the credit card .svg file.

Your organization will probably use only one template for credit card receipts. However, if you need to add an additional template from the Sales Document Templates page in *Tickets*, you no longer choose a report file in the **Report** field. The default .svg file is used for all credit card receipt templates. You still configure printer lists and printing rules for each credit card receipt template you add.



We also made minor changes to the credit card receipt's font and design. Here is a sample receipt:

New System Roles

Note: Each of these new roles must be used in combination with other roles because they do not grant rights to any features; they only deny access to features that are granted access by other roles.

Restrict Personal Information

This system role prevents users from viewing the Demographics and Social Security Number sections on the Personal Info tab of individual constituent records. For example, a user may need to update personal information on constituent records, but should not view this private and sensitive information.

Restrict Smart Fields tab

This system role prevents users from viewing the Smart Fields tab on a constituent record. For example, the Smart Fields tab may include sensitive financial data for the constituent that you want hidden from certain users.

Restrict Contact Tab

This system role prevents users from viewing phone, email, and address information on the Contact tab of constituent records. For example, you may want to prevent volunteers from viewing contact details for other constituents.