Security Guide

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Application Users

Application users are the people at your organization given access to work in ***Altru***. In *Administration*, your system role administrator can add and manage user account records and assign their system roles. System roles specify user permissions, such as which areas of the program users can access and the tasks they can complete.

From the Application Users page in *Administration*, you can view a list of all application user records. From this page you can:

- Send an invitation to invite new users to create an account.
- Assign system roles to users.
- Link an application user to a constituent record to track information about the user's activities as a constituent, such as a fundraiser or board member.
- Delete a user or mark them inactive.
- Filter the application user list by user status (active, inactive, not yet invited, invitation sent, invitation failed).

Altru uses a single sign-on process so users can have one set of credentials to access all Blackbaud resources. Using the Blackbaud Omnibar, you can log in to ***Altru***, blackbaud.com, and other Blackbaud programs using the same username and password. For example, if you use ***Altru*** and ***Financial Edge NXT***, when you log in to ***Altru*** with your Blackbaud ID account, you are logged in to ***Financial Edge NXT*** automatically and you can easily navigate between the two programs in the same window. For more information about single sign-on, see FAQs about Single Sign-On for Altru.

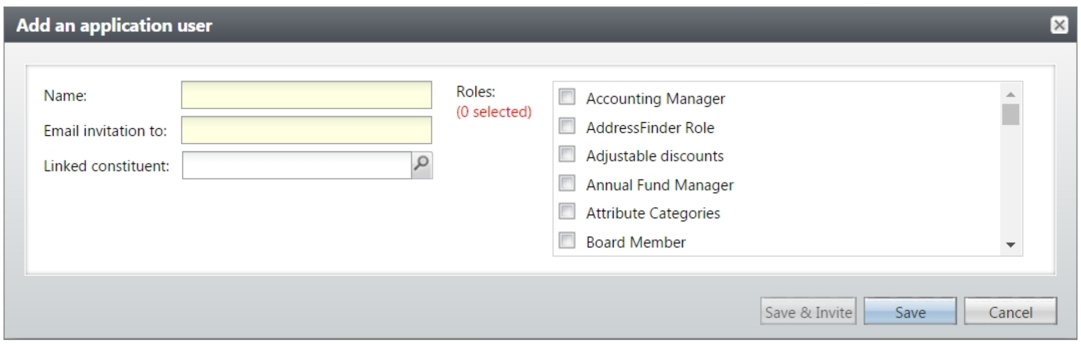
Add Application Users to Altru

Application users are the individual users of your system. When you add users, you assign them to specific system roles to determine the tasks and areas of the application they can access. An email invitation is sent to new users to invite them to create log-in credentials.

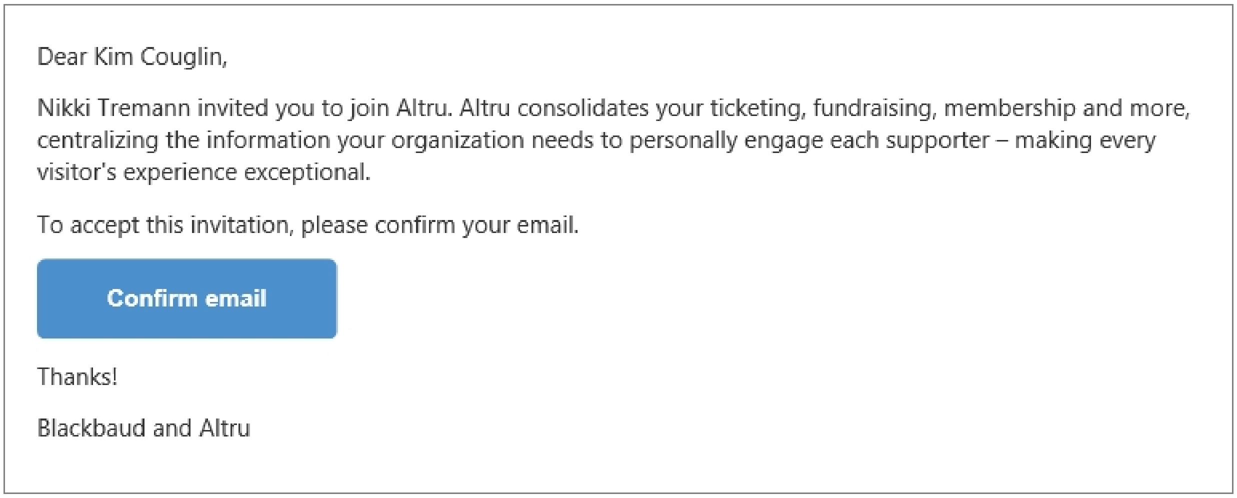
Tip: We recommend that you create a unique user account for each ***Altru*** user. For example, do not create one account that all ticket sellers share. If you must create a shared user account, make sure to use a shared email address for the login.

Add an application user

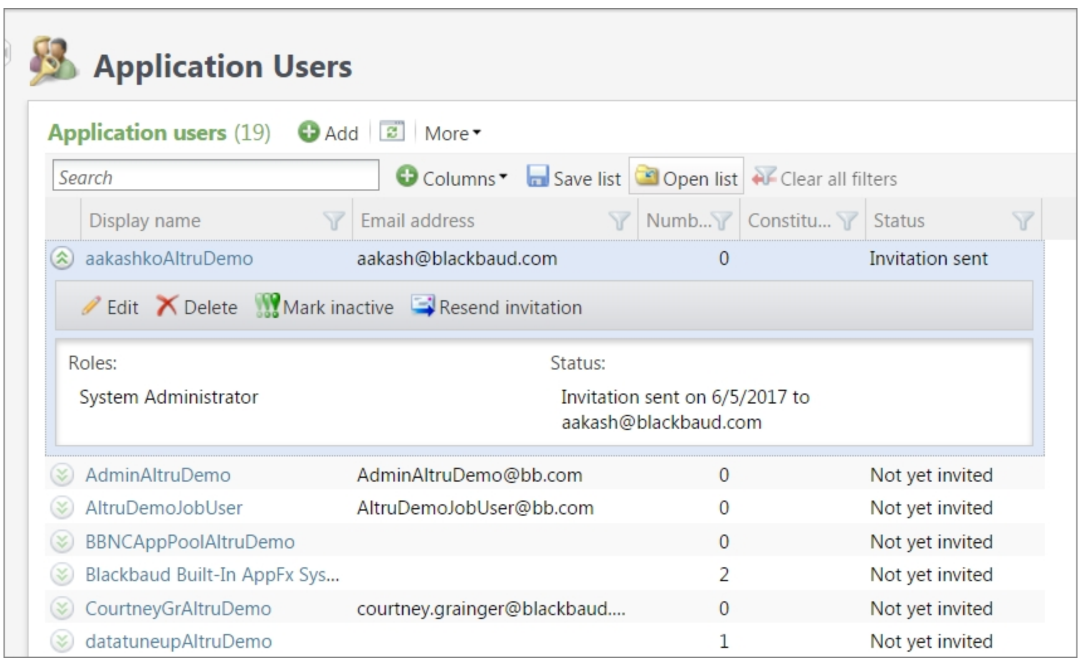
1. From the Application Users page in *Administration*, click **Add**.



2. On the Add an application user screen , enter the user's name and email address.
3. In the **Linked constituent** field, you can link the user to a constituent record to track information about the user's activities as a constituent, such as a fundraiser or board member.
4. In the **Roles** grid, select each role you want to assign to the user. For more information about system roles, see System Roles on page 11.
5. Click **Save & Invite**. An email is sent to invite the user to confirm their single sign-on account for ***Altru***.



6. The invited user must confirm the email address and sign in with their Blackbaud ID account. If the user does not have a Blackbaud ID, they can create one from the sign-in screen.
7. Use the **Status** column on the Application Users page to monitor the status of invitations. You can also resend an invitation, if necessary.



Note: To provide users with access to resources on blackbaud.com, site administrators will need to add users to their Blackbaud site account.

Add Users to your Blackbaud Site Account

A site administrator must add users to the official Blackbaud organization account on blackbaud.com to grant them access to Blackbaud Support, training, and more.

Note: Users can create a Blackbaud ID account without being invited by a site administrator. They can link this account to their ***Altru*** account for single sign-on, but they will not have full access to resources on blackbaud.com until a site administrator adds them to their organization account.

What is a blackbaud.com site administrator?

The blackbaud.com site administrator is generally your organization's primary contact with Blackbaud. This role is different from the ***Altru*** System Role Administrator and may not be the same person(s) in your organization.

Tip: Learn how to become a site administrator for your organization.

Add a user to your Blackbaud site account

1. Log in to **Altru** or blackbaud.com. On the Omnibar, click the drop-down arrow next to your name and then click your email address to open your account.
2. Under **Organization users**, click **Invite User**.
3. Enter the user's first name, last name, and email address, and click **Submit**. To avoid confusion, enter the same email address used for the user's ***Altru*** account.
4. Select the user's main role and click **Submit**. You can select only one role in this step — once the user has confirmed the invitation , you can add additional roles.
5. When you click **Submit**, the user will receive an invitation email and you will receive a copy for your records. The user needs to click the link in the email to complete the process and activate the login.

   Tip: Need help adding users? Check out this KB article.

Edit Application Users

You can edit an application user to link them to a constituent record or to update their system roles.

Edit an application user

1. From *Administration*, click **Application users**. The Application Users page appears.
2. Under **Application users**, expand the user account's row and click **Edit** on the action bar.
3. You can link to a different constituent record or change the system roles assigned to the user.
4. Click **Save** to save the changes and return to the Application Users page.

Delete Application Users

If a user account has been created in error or is no longer needed, you can delete the user from the system.

Note: You cannot delete a user who performed tasks in ***Altru***. Instead, you should mark old users as inactive to retain a history of their actions. For more information, see Disable Application User Accounts on page 7.

Delete an application user

1. From *Administration*, click **Application users**. The Application Users page appears.
2. Under **Application users**, expand the user account's row and click **Delete** on the action bar.
3. Click **Yes** on the confirmation message and the application user is removed from the list.

Disable Application User Accounts

If a user leaves your organization, has their password compromised, or poses some other security risk, you can make their account inactive to disable it. When you disable a user account, the user can no longer log into the application.

Disable an application user's account

1. From *Administration*, click **Application users**. The Application Users page appears.
2. Under **Application users**, expand the user account's row and click **Mark inactive** on the action bar.
3. On the Mark inactive screen, you can enter details about why the account was disabled and then click **Yes** to make the change.
4. You return to the Application Users page and the user's status now says "Marked inactive on <Date>.

Note: To enable an account again, select the application user and click **Mark active** on the action bar.

Link Application Users to Constituent Records

If an application user also has a constituent record, you can link the two records to track information about the user's constituent activities, such as a fundraiser or board member.

Link an application user to a constituent record

1. From *Administration*, click **Application users**. The Application Users page appears.
2. Under **Application users**, expand the user account's row and click **Edit** on the action bar.
3. In the **Linked constituent** field, select the constituent to link to.
4. Click **Save** to save the changes and return to the Application Users page.

Search for Application Users

From the Application Users page, you can search for a user record by name or email address. You can also filter the list by constituent name or user status (active, inactive, not yet invited, invitation sent, invitation failed).

Search for and open an application user record

1. From *Administration*, click **Application users**. The Application Users page appears.
2. In the search box, enter the search criteria to use to find the user record, such as the user's name or email address. Then click **ENTER**.
3. A list of users that match your search criteria appears.
4. Select the user record to open.

Open Application User Records

Application user records display the areas and tasks a user has access to based on their assigned roles. To open an application user record, from the Application Users page or the Users tab of a system role record, select the user's name.

- On the System Roles tab, you can view the roles the user is assigned to. Click **Add** to add additional roles.
- On the Business Process Ownership tab, you can view all business processes the user owns.
- On the Tasks tab, you can view all the tasks associated with the user's assigned roles.
- On the Email Preferences tab, you can manage the user's email alerts. Under **Email alert settings**, click **Edit** to enter the email address to use for alerts. Under **Email alerts**, expand a type of alert and click **Enable**.

Update Your Password

Each application user manages their own password — system administrators cannot reset your password for you.

If you forget your password, click the **Forgot password?** link on the Blackbaud ID sign-in page to receive a password reset email. If you use *Gmail* to log in, the **Forgot password?** link does not appear. You must access your Google account to change your password.

Note: If you run into issues using the **Forgot password?** link on the Blackbaud ID sign-in page and cannot log in, contact the Altru Support team to reset your password.

Change your password

1. Log in to the Blackbaud ID sign-in page.

2. Click the drop-arrow next to your name at the top of any Blackbaud web page to access your Blackbaud ID profile page.
3. Click **View my account**.
4. Under **About Me**, click **Change password**.
5. On the Change password screen, enter the new password.

   Note: If you registered your account using *Google*, you'll get a message telling you to go to *Google* to update your password.

6. Click **Change** to save the updated password and return to your profile page.

Password requirements

Other important information:

- Passwords must be these requirements:
- 8 characters or more
- Passwords must contain at least three of the following four character types: uppercase letters (ABC), lowercase letters (abc), numbers (123), or symbol characters (!@#).

Other important information:

- A password cannot be the same or overly similar to a previously used password.
- Users will be locked out for 30 minutes after 5 incorrect password attempts in a 1 hour period.
- Passwords do not expire or need to be reset after a set amount of time.
- User accounts are automatically marked inactive after 180 days of inactivity. Users will need to reset their password to reactivate their account.

Two-step Authentication

To increase security for your Blackbaud ID, you can enable two-step authentication. With this extra layer of security, your Blackbaud ID requires a unique verification code you receive on your personal device. To enable two-step authentication, go to your Blackbaud ID profile page and select **Turn on** under **Two-step authentication**. (If you sign in with Google, select **Turn off Google authentication** first.) Learn more about two-step authentication.

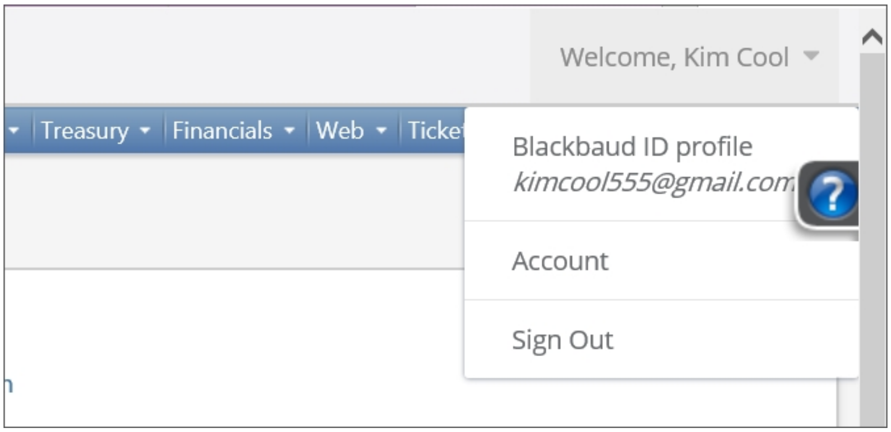
Blackbaud ID and Omnibar

Your Blackbaud ID is the account used to log in to ***Altru*** and other Blackbaud resources and solutions. To create a Blackbaud ID account, you can be invited by your site administrator or you can create one yourself from the Blackbaud ID sign-in screen.

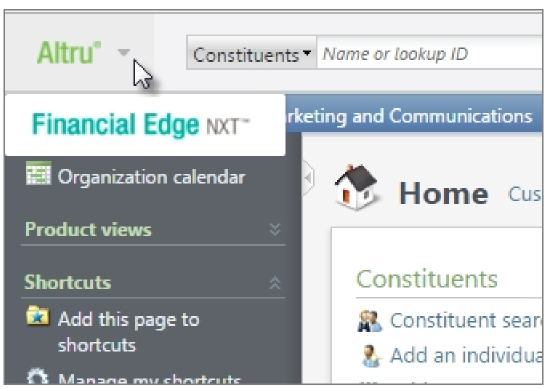
Note: If you create your Blackbaud ID without being invited by a site administrator, you'll be able to link your Blackbaud ID to your ***Altru*** account for single sign-on, but you won't have full access to resources on blackbaud.com until a site administrator adds you to the organization account.

The Blackbaud Omnibar appears at the top of the screen in ***Altru*** and blackbaud.com. After you sign-in, use the Omnibar to:

- Manage your Blackbaud ID profile — including your contact information, email, and password.



- Quickly switch between applications in the same window (if you use multiple Blackbaud programs).



- Easily navigate from ***Altru*** to resources on blackbaud.com (Knowledgebase, Training) without having to log in for each.

System Roles

Manage System Roles

To establish user security and limit access to only job-specific functions within the program, users are assigned to system roles. The program includes a set of standard system roles that should meet the needs of your organization. Only users with the System Role Administrator role can assign system roles.

The System Roles page provides a central location to manage system roles. To access the System Roles page, from *Administration*, click **System roles**.

Assign Users to a System Role

Users should be limited to only system roles needed to complete their specific job responsibilities. Roles ensure that each user can only access the tasks and features granted to them.

As a user's job responsibilities change, you may need to adjust the system roles they are assigned to. In some cases, you will need to assign a user to new roles and remove them from other roles.

Note: The tasks assigned to system roles are preconfigured and cannot be changed. Some users will need to be assigned to multiple system roles to provide all the privileges they need.

Assign a user to a system role

1. From *Administration*, click **Application users**. The Application Users page appears.
2. Select the application user and click **Edit**. The Edit screen appears.
3. You can select the system roles for this application user. You can also add or edit a linked constituent, if needed.

Note: Roles changes do not take effect immediately — an updated user must log out, close their browser, and log back in.

Remove Users from System Roles

When an application user's job responsibilities change, you can update the system roles they are assigned to. You can also remove a user from a system role if they no longer need access to its tasks and features.

Open a User's System Role Record

From the Users tab of a system role, from the list, select a user's name to open their system role record. From a user's record, you can view their assigned system roles and the tasks, features, and other functions they can access. The information on the Application user tabs is based on the permissions established for the system roles the user belongs to and is view-only.

View Tasks Assigned to System Roles

Each system role comes with pre-configured tasks you cannot edit. To view the tasks assigned to a role:

1. From *Administration*, select **System roles**.
2. Click the name of the role to open. The system role's record opens.
3. Select the Tasks tab to view all the tasks assigned.

Assign Code Table Permissions to a System Role

When you assign code table permissions, you specify whether users in the system role can add entries to a table "on the fly," edit existing entries, or delete entries. For example, when you add or edit a constituent record, users with add or edit rights to the **Title** table can press **F7** or click the name of the **Title** field to access a screen where they can edit the existing code table entries for it or add new ones.

Access to the table itself is determined by whether or not the role has access to the feature(s) where the table appears.

Assign code table permissions

1. From a system role, select the Code Tables tab.
2. Click **Assign code table permissions**. The Edit code table permissions screen appears.
3. To grant add, edit, and delete permissions, in a code table category row, select "Granted" or "Denied" in the **Add**, **Edit**, and **Delete** columns.

   To quickly grant or deny all permissions in the table, click **Grant all** or **Deny all**. These options are useful if you want to grant access to only a few code tables — click **Deny all** and then select the individual rows or columns and change them to "Granted."
4. Click **Save**. You return to the Code Tables tab which displays a list of all code tables. In the columns, you can view the permissions granted to each table you edited.

Deny code table entry permissions

1. From a system role, select the Code Tables tab.
2. Under **Code table entry permissions**, expand the table entry and click **Assign permissions**.

   On the Assign code table entry permissions screen, select the table entries you want to deny rights to add, edit, or delete. You can also click **Deny all** to mark all entries at one time.
3. Click **Save**. You return to the Code Tables tab. The Denied entries column displays the number of entries denied for each code table you edited.

Assign Smart Field Permissions to a System Role

On the Smart Fields tab of a system role, you can grant access to specific types of smart fields. Users in this role can access the Smart fields tab on records to view the selected types of smart fields.

The Smart Fields system role controls who can configure smart fields. For more information, see Smart Fields on page 91

Assign smart fields to a system role

1. From a system role, select the Smart Fields tab.
2. Click **Assign smart fields**. The Assign smart fields screen appears.

3. Expand the type of smart fields to drill down to the specific type of smart field you want to assign to the role. When you select a field, it appears on the right.
4. Click **Save**. You return to the Smart Fields tab. The selected field appears under **Assigned Smart Fields**.

System Role and Task Definitions

The following sections define each system role and their associated tasks. Use this information to become familiar with roles and how they match up with job roles in your organization. For information about assigning users to system roles, see Assign Users to a System Role on page 13.

Accounting Manager

Users assigned the Accounting Manager role perform and oversee accounting tasks at your organization. Users in this role set up and manage general ledger accounts as well as other accounting functionality.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Approve reconciliation	Approve ticket seller reconciliations and create deposits.	Sales
Blackbaud Payment Service merchant accounts	Provides an interface for managing Blackbaud Payment Service merchant accounts.	Revenue
Business process ownership	View and edit business process owners.	Administration
Clear matching gift claims	Clear matching gift claims from the system.	Revenue
Configuration export	Provides a user interface for exporting configuration data.	Administration
Configuration import	Provides a user interface for importing configuration data.	Administration
Constituency Ordering	Set the order used in choosing constituency for account number calculation.	Administration
Default gift fees	Manage default gift fees	Revenue
Define account structure	Specify the desired segments, their lengths, and what they map to in the system.	Administration
Define GL Accounts	Specify what account code values to use in each situation when generating GL distributions	Administration

Task name	Task description	Functional area
Define Segment Mappings	Specify the segment values to use when generating GL distributions	Administration
Define Transaction Mappings	Specify what account code values to use in each situation when generating GL distributions	Administration
Export	Create and manage exports of query results.	Administration
Fee	View the fee report.	Sales
Financials	Manage financial information and bank transactions from all areas of an organization.	Financials
Fiscal year end	Configure the system fiscal year.	Administration
Fiscal years	Manage all GL fiscal years.	Administration
General ledger setup	Define fiscal years, account systems, account structure, accounts, transaction and segment mappings.	Administration
General ledger setup	Define fiscal years, account structure, accounts, transaction and segment mappings.	Administration
GL account setup	Define account structure, GL accounts, mappings, and segment mappings	Administration
Global pledge write-off	This task allows users to globally write-off pledges.	Revenue
Import	Create and manage imports into batch.	Administration
Map revenue to GL	Define the account numbers and project codes used when posting to a general ledger.	Revenue
Notifications	Provides a user interface for managing notifications.	Administration
Pledge subtypes	Provides an interface for managing pledge subtypes.	Revenue
Post revenue to GL	This task allows users to post revenue records to GL.	Revenue
Revenue categories	Manage all revenue categories.	Revenue
Sales	View a list of sales figures.	Sales
Sales	View the sales report.	Analysis
Tax	View the tax report.	Sales
Unmapped general ledger items	View the unmapped general ledger items report.	Tickets

AddressFinder

AddressFinder is a subscription service that provides the most current address information available for your constituents, based on the United States Postal Service NCOALink database.

After your subscription is activated, users in this role can submit data files to update. After the file is updated by the service, they can import and update records with the new information.

Task name	Task description	Functional area
Data tune-up	Manage data tune-up processes	Administration

Adjustable Discounts

Use this role to provide certain ticket sellers the ability to add or delete adjustable discounts in advance or daily sales without giving them full access to guest services features.

Annual Fund Manager

Users assigned the Annual Fund Manager role develop and manage a comprehensive Annual Fund for your organization. Users in this role can access and manage administration options to communicate with constituents such as for appeal mailings and other solicitations. An Annual Fund Manager can also manage constituent and revenue data, set up appeal mailings and events, and generate reports and key performance indicators (KPIs) to track the effectiveness of the fundraising efforts.

Task name	Task description	Functional area
Account distribution	View the account distribution report.	Analysis
Account distribution	View the account distribution report.	Revenue
Acknowledgements	Process acknowledgements for revenue records.	Marketing and Communications
Activity	View the pledge and recurring gift activity report from revenue.	Revenue
Activity	View the pledge and recurring gift activity report.	Analysis
Add a campaign	Add a new campaign.	Fundraising
Add a committee	Add a new committee.	Constituents
Add a direct marketing email	Add a new email based on a direct marketing export definition.	Marketing and Communications
Add a group	Add a new group constituent.	Constituents

Task name	Task description	Functional area
Add a household	Add a new household constituent.	Constituents
Add a payment	Add a new payment.	Revenue
Add a pledge	Add a new pledge.	Revenue
Add a purpose	Add a new fundraising purpose.	Fundraising
Add a recurring gift	Add a new recurring gift.	Revenue
Add an email package	Add the different pieces available for direct marketing email efforts.	Marketing and Communications
Add an individual	Add a new individual constituent.	Constituents
Add an organization	Add a new organization constituent.	Constituents
Address processing options	View and manage the list of address processing option sets.	Marketing and Communications
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Revenue
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal mailings	View all appeal mailings in the system.	Marketing and Communications
Appeal package performance	View performance data for appeals and packages.	Analysis
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Ask ladder response	Analyze the response rates of ask ladders.	Marketing and Communications
Ask ladders	Manage ask ladders to be used in marketing efforts.	Marketing and Communications

Task name	Task description	Functional area
Average gift comparison	Compare average gift amounts for different segments over a span of years.	Marketing and Communications
Batch entry	Manage batches through all stages of the batch workflow.	Constituents
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch search	Search for and view batches.	Constituents
Batch search	Search for and view batches.	Revenue
Benefits catalog	Search for and view benefits.	Fundraising
Blackbaud Payment Service merchant accounts	Provides an interface for managing Blackbaud Payment Service merchant accounts.	Revenue
Business process ownership	View and edit business process owners.	Administration
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications
Campaign hierarchy search	Search for and view campaign hierarchies.	Fundraising
Campaign recognition credit	View a campaign's recognition credits.	Analysis
Campaign recognition credit	View a campaign's recognition credits.	Fundraising
Campaign search	Search for and view campaigns.	Fundraising
Campaign summary	View a campaign summary.	Analysis
Campaign summary	View a campaign summary.	Fundraising
Clear matching gift claims	Clear matching gift claims from the system.	Revenue
Committee search	Search for and view committee records.	Constituents
Communications analysis	View communication and appeal performance.	Marketing and Communications
Constituencies	Provides an interface for managing constituencies within the system.	Constituents
Constituent data review	Review changes made to constituent contact information.	Constituents
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent group types	Add, edit and delete constituent group types.	Constituents

Task name	Task description	Functional area
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent merge	View, add, and edit constituent merge processes and configurations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent recognition credits	View constituents with their associated recognition credits.	Analysis
Constituent recognition credits	View constituents with their associated recognition credits.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Constituent tributes	View constituents with their associated tributes.	Analysis
Constituent tributes	View constituents with their associated tributes.	Constituents
Data tune-up	Manage data tune-up processes.	Administration
Designation progress	View progress of selected designations within a hierarchy.	Analysis
Designation progress	View progress of selected designations within a hierarchy.	Fundraising
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constituent search.	Constituents
Duplicate record check settings	Modify the settings used to identify duplicate records when adding a new record.	Constituents
Event profile	View a detailed profile of an event.	Analysis
Event summary	View summary information for events.	Analysis
Export	Create and manage exports of query results.	Administration
Export definitions	Create and manage export definitions for marketing efforts.	Marketing and Communications
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Analysis

Task name	Task description	Functional area
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Fundraising
Finder file counts	View the finder file counts for a marketing effort.	Marketing and Communications
First names	Modify first names table.	Constituents
Fundraising Effectiveness Project	Create and submit a file to AFP to participate in the Fundraising Effectiveness Project.	Administration
Fundraising hierarchies	Create and edit designation hierarchies.	Fundraising
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Analysis
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Fundraising
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Analysis
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Fundraising
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Analysis
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Fundraising
Fundraising purpose revenue	View fundraising purpose revenue information.	Analysis
Fundraising purpose revenue	View fundraising purpose revenue information.	Fundraising
Fundraising purpose types	Configure fundraising purpose types.	Fundraising
Generate MatchFinder updates	Create batch of organization updates from MatchFinder Online.	Revenue
Global pledge write-off	This task allows users to globally write-off pledges.	Revenue
Hierarchical campaign summary	View a campaign hierarchy summary.	Analysis
Household settings	Provides an interface for managing household settings.	Constituents

Task name	Task description	Functional area
Indirect responses	View all indirect gifts for a marketing effort.	Marketing and Communications
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
Letter template library	Manage the letter template library.	Marketing and Communications
Life changes	Provides an interface for managing life changes within the system.	Constituents
List performance	Analyze list performance metrics including number of new donors, response rates, and ROI.	Marketing and Communications
List profile	View a detailed profile of a list.	Marketing and Communications
List summary	Detailed list report including metrics such as cost, total records, and expiration date.	Marketing and Communications
Manage correspondence	This task allows users to send correspondence to constituents.	Marketing and Communications
Marketing acknowledgements	Create and process marketing acknowledgements.	Marketing and Communications
Marketing record counts	View list use for a marketing effort.	Marketing and Communications
Marketing revenue	View total revenue for a marketing plan, appeal or marketing effort by day, week, month, or year.	Marketing and Communications
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Matching gift claim summary	View matching gift claim summary information.	Analysis
Matching gift claim summary	View matching gift claim summary information.	Revenue
Merge two constituents	Manually merge two selected constituents.	Constituents
Merged constituent search	Trace a merged constituent to the constituent into which it was merged.	Constituents
Name format options	Provides an interface for managing name format options.	Marketing and Communications

Task name	Task description	Functional area
Notifications	Provides a user interface for managing notifications.	Administration
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Organization search	Search for and view organization records.	Constituents
Origination settings	Configure constituent origination settings.	Constituents
Package performance	Displays package performance of a segment selection	Marketing and Communications
Plan income forecast	Expected income schedule by marketing effort for a plan.	Marketing and Communications
Plan status	Compare the actual results of marketing plans with their expected results.	Marketing and Communications
Planned marketing profile	View a detailed profile of a planned marketing effort.	Marketing and Communications
Planner income outlook	Yearly overview of income expectations by plan.	Marketing and Communications
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Pledge subtypes	Provides an interface for managing pledge subtypes.	Revenue
Projected income	View the projected income report.	Analysis
Projected income	View the projected income report.	Revenue
Purpose search	Search for and view fundraising purposes.	Fundraising
Query	Create and manage queries.	Analysis
Reason codes	Displays the page to manage reason codes.	Constituents
Reason codes	Displays the page to manage reason codes.	Revenue
Receipt and acknowledgement preferences	Configure the system receipt and acknowledgement preferences.	Marketing and Communications
Receipts	Process receipts for revenue records.	Marketing and Communications
Recognition credits	View recognition credits and associated revenue records from the revenue functional area.	Revenue

Task name	Task description	Functional area
Recognition credits	View recognition credits and associated revenue records.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Revenue
Reconcile matching gifts	Reconcile unapplied matching gift payments to existing or new unpaid matching gift claims.	Revenue
Recurring gift missed payments	View the missed recurring gift report.	Analysis
Recurring gift missed payments	View the missed recurring gift report.	Revenue
Relationship settings	Provides an interface for managing relationship settings.	Constituents
Relationship types	Provides an interface for managing relationship types.	Records
Reminders	Generate reminders.	Marketing and Communications
Removed member counts	View the removed member counts for a marketing effort.	Marketing and Communications
Report explorer	Explore and run reports located on the Report Server.	Analysis
Reporting filters	Manage revenue filters.	Revenue
Response categories and responses	Provides an interface for managing response categories and responses within the system.	Marketing and Communications
Retention and attrition	View retention and attrition by year for a segment.	Marketing and Communications
Revenue annual statement	View the revenue annual statement report.	Analysis
Revenue annual statement	View the revenue annual statement report.	Revenue
Revenue by payment method	View the revenue by payment method report.	Analysis
Revenue by payment method	View the revenue by payment method report.	Revenue
Revenue detail	View details of constituent giving.	Analysis
Revenue detail	View details of constituent giving.	Revenue

Task name	Task description	Functional area
Revenue detail group/household	View details of group or household giving.	Analysis
Revenue detail group/household	View details of group or household giving.	Revenue
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Analysis
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits from the revenue functional area.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits.	Analysis
Sales	View a list of sales figures.	Sales
Sales	View the sales report.	Analysis
Search MatchFinder Online	Identify matching gift organizations by searching MatchFinder Online.	Revenue
Seeds	Manage people who should receive your marketing efforts, but should not be included in the analyses.	Marketing and Communications
Segmented house file counts	View the segmented house file counts for a marketing effort.	Analysis
Segmented house file counts	View the segmented house file counts for a marketing effort.	Marketing and Communications
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Solicit codes	Manage solicit codes	Marketing and Communications
Source analysis response	Analyze response rates by source analysis value.	Marketing and Communications
Source code performance	Displays the source code performance for a selection of marketing efforts.	Marketing and Communications

Task name	Task description	Functional area
Tax	View the tax report.	Sales
Title code defaults	Modify title code defaults.	Constituents
Transaction search	Search for and view revenue transaction records.	Revenue
Tribute acknowledgements	Task to manage your tribute acknowledgement processes.	Marketing and Communications
Tributes	Create and edit tributes.	Constituents
Unmapped general ledger items	View the unmapped general ledger items report.	Tickets
Unresolved responses	View all unresolved gifts for a marketing effort.	Marketing and Communications
Vendors	Manage information about the suppliers of items and services to your organization.	Marketing and Communications
View acquisition lists	Manage lists you purchase, or obtain internally or from other organizations.	Marketing and Communications
View creatives	Add and manage the items that make up your marketing effort packages, such as graphics or brochures.	Marketing and Communications
View marketing efforts	Manage all aspects of marketing efforts including packages, segments, analysis, and more.	Marketing and Communications
View marketing plans	Establish your estimates for costs and marketing efforts for the next year or another set time period.	Marketing and Communications
View packages	Manage the different pieces available for all your marketing efforts.	Marketing and Communications
View segments	Manage the groupings of your prospects that enable you to target them.	Marketing and Communications
View selections	Manage the criteria used to filter records and create your marketing effort segments.	Marketing and Communications
View white mail segments	Manage your white mail segments.	Marketing and Communications
Volunteer daily schedule	Show the daily schedule report for all volunteers.	Analysis
Volunteer search	Search for and view volunteer records.	Volunteers
Web dashboard	View personalized dashboards	Analysis

Attribute Categories

Users assigned this role can add, edit, and delete attribute categories, which are used to organize attributes. With attributes, you can define and store special information about a wide variety of record types.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Attribute categories	Provides a user interface for managing attribute categories.	Administration

Blackbaud Built-In AppFx System User Role

This user role is assigned to system generated processes that run automatically and do not require user interaction. This role is not intended to be assigned to individuals.

Board Member

Users assigned the Board Member role drive the overall vision of your organization. They can view data about constituents, prospects, and events and generate reports and KPIs to track the effectiveness of the fundraising efforts.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications

Task name	Task description	Functional area
Campaign recognition credit	View a campaign's recognition credits.	Analysis
Campaign summary	View a campaign summary.	Analysis
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Event attendance	View the event attendance report.	Analysis
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event summary	View summary information for events.	Analysis
Fundraisers and steps	View major giving management fundraisers and steps page.	Prospects
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Analysis
Fundraising purpose revenue	View fundraising purpose revenue information.	Analysis
Hierarchical campaign summary	View a campaign hierarchy summary.	Analysis
Household settings	Provides an interface for managing household settings.	Constituents
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
Marketing revenue	View total revenue for a marketing plan, appeal or marketing effort by day, week, month, or year.	Marketing and Communications

Task name	Task description	Functional area
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership revenue	Displays the membership revenue report	Analysis
Naming opportunity recognition	View naming opportunity recognitions.	Analysis
Opportunities	View major giving management opportunities and asks page.	Prospects
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Organization search	Search for and view organization records.	Constituents
Plan income forecast	Expected income schedule by marketing effort for a plan.	Marketing and Communications
Plan status	Compare the actual results of marketing plans with their expected results.	Marketing and Communications
Planned gift detail	Displays the planned gift detail report.	Analysis
Planner income outlook	Yearly overview of income expectations by plan.	Marketing and Communications
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Prospects	View major giving management prospects page.	Prospects
Recognition revenue	View a report detailing the recognition revenue of a particular program.	Analysis

Task name	Task description	Functional area
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Tribute revenue	View tribute records with associated revenue.	Analysis
Tributes	Create and edit tributes.	Constituents
Web dashboard	View personalized dashboards	Analysis

Calendar View Only

Users assigned this role have view only rights to the organization calendar. This role is useful for people at your organization, such as a security guard, who need to view the calendar without adding or editing events.

Task name	Task description	Functional area
Organization calendar	View events, mailings, and other activities taking place across the organization	Administration

Code Tables

Users assigned this role can view, add, and edit code tables in *Administration*.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Code tables	View the list of code tables and table entries.	Administration

Constituent View Only

Users assigned this role can search for and view information about constituents but cannot edit or delete information on constituent records. This view-only role is intended for users who need to view constituent information but do not perform actual data entry or shouldn't have the ability to change information on constituent records.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Constituent search	Search for and view constituent records.	Constituents

DeceasedRecordFinder Role

DeceasedRecordFinder is a subscription service that scans all constituents in a submitted data file to identify deceased constituents, based on the names and addresses in the file.

After your subscription is activated, users in this role can submit data files to update. After the file is updated by the service, they can import and update records with the new information.

Task name	Task description	Functional area
Data tune-up	Manage data tune-up processes	Administration

Delete Permissions

Users assigned the Delete permissions role can permanently remove records and information from the database. We strongly recommend that you limit the number of users assigned to this role.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets

Development Officer - View Only

Generally a view-only role, this ***ResearchPoint*** role allows users to review the data in the system but they cannot make any changes. The Development Officer can run constituent searches, view data, print prospect profiles, and run some general queries.

Task name	Task description	Functional area
Add a prospect research request	Add a new prospect research request.	Prospects

Task name	Task description	Functional area
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent search	Search for and view constituent records.	Prospects
My fundraiser page	View my major giving area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Product news	Launch browser to read about ResearchPoint product news, release notes, and The Prospector.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Query	Create and manage queries.	Analysis
Target Analytics events	Launch browser and learn about upcoming Target Analytics webinars, seminars, and conferences.	Prospects
Training	Launch browser and open the ResearchPoint eLearning Library to view training videos.	Prospects
User guides	Launch browser to view the ResearchPoint Admin, Data, and Prospect Management Guides.	Prospects

Development Officer - Advanced Rights

This ***ResearchPoint*** role provides additional rights not included in the Development Officer- View only role. The Advanced Rights role also allows access to search and review prospects, and access to research lists, research groups, and the individual screen.

Task name	Task description	Functional area
Add a prospect research request	Add a new prospect research request.	Prospects
Run prospect search	Search all existing ResearchPoint prospects; any integrated Raiser's Edge databases; and the external Target Analytics database. Role does not allow user to add or modify data.	Prospects
View Research Lists	View only	Prospects

Task name	Task description	Functional area
View Research groups	View only	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent search	Search for and view constituent records.	Prospects
My fundraiser page	View my major giving area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Product news	Launch browser to read about ResearchPoint product news, release notes, and The Prospector.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Query	Create and manage queries.	Analysis
Target Analytics events	Launch browser and learn about upcoming Target Analytics webinars, seminars, and conferences.	Prospects
Training	Launch browser and open the ResearchPoint eLearning Library to view training videos.	Prospects
User guides	Launch browser to view the ResearchPoint Admin, Data, and Prospect Management Guides.	Prospects

Development Data Entry

Users assigned the Data Entry role perform the daily data entry tasks. They can add and manage data about constituents, revenue, prospects, events, and volunteers. A Data Entry user can also manage mailings, create queries, and generate reports and KPIs to track and compare data.

Task name	Task description	Functional area
Account distribution	View the account distribution report.	Analysis

Task name	Task description	Functional area
Account distribution	View the account distribution report.	Revenue
Acknowledgements	Process acknowledgements for revenue records.	Marketing and Communications
Activity	View the pledge and recurring gift activity report from revenue.	Revenue
Activity	View the pledge and recurring gift activity report.	Analysis
Add a campaign	Add a new campaign.	Fundraising
Add a committee	Add a new committee.	Constituents
Add a direct marketing email	Add a new email based on a direct marketing export definition.	Marketing and Communications
Add a fundraiser	Add a fundraiser from an existing or new constituent record.	Prospects
Add a group	Add a new group constituent.	Constituents
Add a group	Add a new group constituent.	Prospects
Add a household	Add a new household constituent.	Constituents
Add a household	Add a new household constituent.	Prospects
Add a job	Add a new job.	Volunteers
Add a major giving prospect	Add a major giving prospect from an existing or new constituent record.	Prospects
Add a naming opportunity	Add a new naming opportunity.	Fundraising
Add a payment	Add a new payment.	Revenue
Add a pledge	Add a new pledge.	Revenue
Add a purpose	Add a new fundraising purpose.	Fundraising
Add a recurring gift	Add a new recurring gift.	Revenue
Add a stewardship plan	Provides an interface for adding a stewardship plan for a constituent.	Prospects
Add a volunteer	Add a new volunteer.	Volunteers
Add an appeal	Add a new appeal.	Marketing and Communications

Task name	Task description	Functional area
Add an email package	Add the different pieces available for direct marketing email efforts.	Marketing and Communications
Add an event	Add a new event.	Events
Add an individual	Add a new individual constituent.	Constituents
Add an individual	Add a new individual constituent.	Prospects
Add an organization	Add a new organization constituent.	Constituents
Add an organization	Add a new organization constituent.	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Revenue
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Volunteers
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal mailings	View all appeal mailings in the system.	Marketing and Communications
Appeal package performance	View performance data for appeals and packages.	Analysis
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Appeal search	Search for and view appeal records.	Marketing and Communications
Ask ladder response	Analyze the response rates of ask ladders.	Marketing and Communications

Task name	Task description	Functional area
Ask ladders	Manage ask ladders to be used in marketing efforts.	Marketing and Communications
Assign prospects in bulk	Assign or reassign a large number of prospects to a fundraiser.	Prospects
Average gift comparison	Compare average gift amounts for different segments over a span of years.	Marketing and Communications
Batch entry	Manage batches through all stages of the batch workflow.	Constituents
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch entry	Manage batches through all stages of the batch workflow.	Volunteers
Batch search	Search for and view batches.	Constituents
Batch search	Search for and view batches.	Revenue
Batch search	Search for and view batches.	Volunteers
Benefits list	Displays a report listing all constituent benefits within a particular date range.	Analysis
Blackbaud Payment Service merchant accounts	Provides an interface for managing Blackbaud Payment Service merchant accounts.	Revenue
Business process ownership	View and edit business process owners.	Administration
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications
Campaign hierarchy search	Search for and view campaign hierarchies.	Fundraising
Campaign recognition credit	View a campaign's recognition credits.	Analysis
Campaign recognition credit	View a campaign's recognition credits.	Fundraising
Campaign search	Search for and view campaigns.	Fundraising
Campaign summary	View a campaign summary.	Analysis
Campaign summary	View a campaign summary.	Fundraising
Clear matching gift claims	Clear matching gift claims from the system.	Revenue
Committee search	Search for and view committee records.	Constituents
Communications analysis	View communication and appeal performance.	Marketing and Communications

Task name	Task description	Functional area
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent group types	Add, edit and delete constituent group types.	Prospects
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent merge	View, add, and edit constituent merge processes and configurations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent recognition credits	View constituents with their associated recognition credits.	Analysis
Constituent recognition credits	View constituents with their associated recognition credits.	Constituents
Constituent recognition processes	Manage constituent recognition processes.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Constituent search	Search for and view constituent records.	Prospects
Constituent tributes	View constituents with their associated tributes.	Analysis
Constituent tributes	View constituents with their associated tributes.	Constituents
Designation progress	View progress of selected designations within a hierarchy.	Analysis
Designation progress	View progress of selected designations within a hierarchy.	Fundraising
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constituent search.	Constituents
Duplicate record check settings	Modify the settings used to identify duplicate records when adding a new record.	Constituents
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis

Task name	Task description	Functional area
Export	Create and manage exports of query results.	Administration
Export definitions	Create and manage export definitions for marketing efforts.	Marketing and Communications
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Analysis
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Fundraising
Finder file counts	View the finder file counts for a marketing effort.	Marketing and Communications
First names	Modify first names table.	Constituents
Full duplicate search	Search the entire database for duplicate constituents.	Constituents
Fundraiser search	Search for and view fundraiser records.	Prospects
Fundraising Effectiveness Project	Create and submit a file to AFP to participate in the Fundraising Effectiveness Project.	Administration
Fundraising hierarchies	Create and edit designation hierarchies.	Fundraising
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Analysis
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Fundraising
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Analysis
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Fundraising
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Analysis
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Fundraising
Fundraising purpose revenue	View fundraising purpose revenue information.	Analysis
Fundraising purpose revenue	View fundraising purpose revenue information.	Fundraising

Task name	Task description	Functional area
Generate MatchFinder updates	Create batch of organization updates from MatchFinder Online.	Revenue
Global pledge write-off	This task allows users to globally write-off pledges.	Revenue
Hierarchical campaign summary	View a campaign hierarchy summary.	Analysis
Household settings	Provides an interface for managing household settings.	Constituents
Incremental duplicate search	Find duplicates in constituents added or updated since the last duplicate search.	Constituents
Indirect responses	View all indirect gifts for a marketing effort.	Marketing and Communications
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
Job openings	View the list of job openings.	Volunteers
Job schedule	Show the job schedule report.	Analysis
Job schedules	Show the daily schedule report for all jobs.	Analysis
Job search	Search for and view job records.	Volunteers
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
List performance	Analyze list performance metrics including number of new donors, response rates, and ROI.	Marketing and Communications
List profile	View a detailed profile of a list.	Marketing and Communications
List summary	Detailed list report including metrics such as cost, total records, and expiration date.	Marketing and Communications
Major giving prospect search	Search for and view major giving prospect records.	Prospects
Manage correspondence	This task allows users to send correspondence to constituents.	Marketing and Communications
Manage modeling and propensity	Manage modeling and propensity ratings.	Prospects
Manage research groups	Create, populate and view research groups.	Prospects
Marketing acknowledgements	Create and process marketing acknowledgements.	Marketing and Communications

Task name	Task description	Functional area
Marketing record counts	View list use for a marketing effort.	Marketing and Communications
Marketing revenue	View total revenue for a marketing plan, appeal or marketing effort by day, week, month, or year.	Marketing and Communications
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Matching gift claim summary	View matching gift claim summary information.	Analysis
Matching gift claim summary	View matching gift claim summary information.	Revenue
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership count	View a reporting detailing the membership count of a particular program.	Analysis
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership renewal efforts	Create and process membership renewal efforts.	Marketing and Communications
Membership revenue	Displays the membership revenue report	Analysis
Membership statistics comparison	Displays the membership statistics comparison report	Analysis
Merge two constituents	Manually merge two selected constituents.	Constituents
Merged constituent search	Trace a merged constituent to the constituent into which it was merged.	Constituents
Name format options	Provides an interface for managing name format options.	Marketing and Communications
Naming opportunity availability	View naming opportunity availability.	Analysis

Task name	Task description	Functional area
Naming opportunity recognition	View naming opportunity recognitions.	Analysis
Naming opportunity search	Search for and view naming opportunities.	Fundraising
Opportunity pipeline	Displays the opportunity pipeline report.	Analysis
Organization calendar	View events, mailings, and other activities taking place across your organization.	Administration
Organization search	Search for and view organization constituent records.	Prospects
Organization search	Search for and view organization records.	Constituents
Origination settings	Configure constituent origination settings.	Constituents
Package performance	Displays package performance of a segment selection	Marketing and Communications
Plan income forecast	Expected income schedule by marketing effort for a plan.	Marketing and Communications
Plan status	Compare the actual results of marketing plans with their expected results.	Marketing and Communications
Planned gift acknowledgements	Process acknowledgements for planned gift records.	Marketing and Communications
Planned gift detail	Displays the planned gift detail report.	Analysis
Planned marketing profile	View a detailed profile of a planned marketing effort.	Marketing and Communications
Planner income outlook	Yearly overview of income expectations by plan.	Marketing and Communications
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Pledge subtypes	Provides an interface for managing pledge subtypes.	Revenue
Print membership cards	Print membership cards.	Fundraising
Projected income	View the projected income report.	Analysis
Projected income	View the projected income report.	Revenue
Prospect plan analysis	Displays the prospect plan analysis report.	Analysis
Prospect plan follow-up	Displays the prospect plan follow-up report.	Analysis
Purpose search	Search for and view fundraising purposes.	Fundraising

Task name	Task description	Functional area
Query	Create and manage queries.	Analysis
Reason codes	Displays the page to manage reason codes.	Constituents
Receipts	Process receipts for revenue records.	Marketing and Communications
Recognition count	View a report detailing the recognition count of a particular program.	Analysis
Recognition credits	View recognition credits and associated revenue records from the revenue functional area.	Revenue
Recognition credits	View recognition credits and associated revenue records.	Analysis
Recognition programs	View list of recognition programs.	Constituents
Recognition revenue	View a report detailing the recognition revenue of a particular program.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Revenue
Reconcile matching gifts	Reconcile unapplied matching gift payments to existing or new unpaid matching gift claims.	Revenue
Recurring gift missed payments	View the missed recurring gift report.	Analysis
Recurring gift missed payments	View the missed recurring gift report.	Revenue
Relationship settings	Provides an interface for managing relationship settings.	Constituents
Reminders	Generate reminders.	Marketing and Communications
Removed member counts	View the removed member counts for a marketing effort.	Marketing and Communications
Report explorer	Explore and run reports located on the Report Server.	Analysis
Retention and attrition	View retention and attrition by year for a segment.	Marketing and Communications
Revenue annual statement	View the revenue annual statement report.	Analysis
Revenue annual statement	View the revenue annual statement report.	Revenue

Task name	Task description	Functional area
Revenue by payment method	View the revenue by payment method report.	Analysis
Revenue by payment method	View the revenue by payment method report.	Revenue
Revenue detail	View details of constituent giving.	Analysis
Revenue detail	View details of constituent giving.	Revenue
Revenue detail group/household	View details of group or household giving.	Analysis
Revenue detail group/household	View details of group or household giving.	Revenue
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Analysis
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits from the revenue functional area.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits.	Analysis
Sales	View the sales report.	Analysis
Sales by payment method	View sales grouped by payment method.	Analysis
Sales comparison	View the sales comparison report.	Analysis
Screenings and expirations	View screenings in progress and expiring traits.	Volunteers
Search MatchFinder Online	Identify matching gift organizations by searching MatchFinder Online.	Revenue
Seeds	Manage people who should receive your marketing efforts, but should not be included in the analyses.	Marketing and Communications
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Solicitor revenue	View revenue from solicitors over a specified period.	Analysis

Task name	Task description	Functional area
Solicitor revenue	View revenue from solicitors over a specified period.	Fundraising
Source analysis response	Analyze response rates by source analysis value.	Marketing and Communications
Source code performance	Displays the source code performance for a selection of marketing efforts.	Marketing and Communications
Stewarded donor search	Search for and view stewarded donors.	Prospects
Team fundraising by event	View team fundraising teams' revenue totals by event.	Analysis
Team fundraising by team	View team fundraising teams' revenue totals.	Analysis
Title code defaults	Modify title code defaults.	Constituents
Transaction search	Search for and view revenue transaction records.	Revenue
Tribute acknowledgements	Task to manage your tribute acknowledgement processes.	Marketing and Communications
Tribute revenue	View tribute records with associated revenue.	Analysis
Tributes	Create and edit tributes.	Constituents
Unresolved responses	View all unresolved gifts for a marketing effort.	Marketing and Communications
Vendors	Manage information about the suppliers of items and services to your organization.	Marketing and Communications
View acquisition lists	Manage lists you purchase, or obtain internally or from other organizations.	Marketing and Communications
View creatives	Add and manage the items that make up your marketing effort packages, such as graphics or brochures.	Marketing and Communications
View marketing efforts	Manage all aspects of marketing efforts including packages, segments, analysis, and more.	Marketing and Communications
View marketing plans	Establish your estimates for costs and marketing efforts for the next year or another set time period.	Marketing and Communications
View packages	Manage the different pieces available for all your marketing efforts.	Marketing and Communications
View segments	Manage the groupings of your prospects that enable you to target them.	Marketing and Communications
View selections	Manage the criteria used to filter records and create your marketing effort segments.	Marketing and Communications

Task name	Task description	Functional area
Volunteer daily schedule	Show the daily schedule report for all volunteers.	Analysis
Volunteer performance summary	Show the volunteer performance summary.	Analysis
Volunteer schedule	Show the volunteer schedule report.	Analysis
Volunteer search	Search for and view volunteer records.	Volunteers
VSE survey	View the VSE Survey Report.	Analysis

Director of Development

Users assigned the Director of Development role oversee all aspects of the Development office at your organization. They can add and manage data about constituents, revenue, prospects, events, and volunteers. A Director of Development user can also manage mailings, create queries, and generate reports and KPIs to track the effectiveness of the fundraising efforts.

Task name	Task description	Functional area
Account distribution	View the account distribution report.	Analysis
Account distribution	View the account distribution report.	Revenue
Acknowledgements	Process acknowledgements for revenue records.	Marketing and Communications
Activity	View the pledge and recurring gift activity report from revenue.	Revenue
Activity	View the pledge and recurring gift activity report.	Analysis
Add a committee	Add a new committee.	Constituents
Add a direct marketing email	Add a new email based on a direct marketing export definition.	Marketing and Communications
Add a fundraiser	Add a fundraiser from an existing or new constituent record.	Prospects
Add a group	Add a new group constituent.	Constituents
Add a group	Add a new group constituent.	Prospects
Add a household	Add a new household constituent.	Constituents
Add a household	Add a new household constituent.	Prospects
Add a major giving prospect	Add a major giving prospect from an existing or new constituent record.	Prospects

Task name	Task description	Functional area
Add a naming opportunity	Add a new naming opportunity.	Fundraising
Add a payment	Add a new payment.	Revenue
Add a pledge	Add a new pledge.	Revenue
Add a purpose	Add a new fundraising purpose.	Fundraising
Add a recurring gift	Add a new recurring gift.	Revenue
Add a stewardship plan	Provides an interface for adding a stewardship plan for a constituent.	Prospects
Add an appeal	Add a new appeal.	Marketing and Communications
Add an email package	Add the different pieces available for direct marketing email efforts.	Marketing and Communications
Add an individual	Add a new individual constituent.	Constituents
Add an individual	Add a new individual constituent.	Prospects
Add an organization	Add a new organization constituent.	Constituents
Add an organization	Add a new organization constituent.	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Analysis
Adjusted revenue	Viewing adjusted revenue information.	Revenue
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal mailings	View all appeal mailings in the system.	Marketing and Communications
Appeal package performance	View performance data for appeals and packages.	Analysis
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis

Task name	Task description	Functional area
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Appeal search	Search for and view appeal records.	Marketing and Communications
Assign prospects in bulk	Assign or reassign a large number of prospects to a fundraiser.	Prospects
Average gift comparison	Compare average gift amounts for different segments over a span of years.	Marketing and Communications
Batch entry	Manage batches through all stages of the batch workflow.	Constituents
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch search	Search for and view batches.	Constituents
Batch search	Search for and view batches.	Revenue
Benefits list	Displays a report listing all constituent benefits within a particular date range.	Analysis
Blackbaud Payment Service merchant accounts	Provides an interface for managing Blackbaud Payment Service merchant accounts.	Revenue
Business process ownership	View and edit business process owners.	Administration
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications
Clear matching gift claims	Clear matching gift claims from the system.	Revenue
Committee search	Search for and view committee records.	Constituents
Communications analysis	View communication and appeal performance.	Marketing and Communications
Constituencies	Provides an interface for managing constituencies within the system.	Constituents
Constituent data review	Review changes made to constituent contact information.	Constituents
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications

Task name	Task description	Functional area
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent group types	Add, edit and delete constituent group types.	Prospects
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent merge	View, add, and edit constituent merge processes and configurations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent recognition credits	View constituents with their associated recognition credits.	Analysis
Constituent recognition credits	View constituents with their associated recognition credits.	Constituents
Constituent recognition processes	Manage constituent recognition processes.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Constituent search	Search for and view constituent records.	Prospects
Constituent tributes	View constituents with their associated tributes.	Analysis
Constituent tributes	View constituents with their associated tributes.	Constituents
Default communication exclusions	Configure the default communication exclusions.	Marketing and Communications
Designation progress	View progress of selected designations within a hierarchy.	Analysis
Designation progress	View progress of selected designations within a hierarchy.	Fundraising
Direct debit header file	Provides an interface for managing direct debit header file information.	Revenue
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constituent search.	Constituents
Duplicate record check settings	Modify the settings used to identify duplicate records when adding a new record.	Constituents

Task name	Task description	Functional area
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis
Export	Create and manage exports of query results.	Administration
Export definitions	Create and manage export definitions for marketing efforts.	Marketing and Communications
Export definitions	Create and manage export definitions.	Administration
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Analysis
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Fundraising
Finder file counts	View the finder file counts for a marketing effort.	Marketing and Communications
First names	Modify first names table.	Constituents
Full duplicate search	Search the entire database for duplicate constituents.	Constituents
Fundraiser search	Search for and view fundraiser records.	Prospects
Fundraisers and steps	View major giving management fundraisers and steps page.	Prospects
Fundraising Effectiveness Project	Create and submit a file to AFP to participate in the Fundraising Effectiveness Project.	Administration
Fundraising hierarchies	Create and edit designation hierarchies.	Fundraising
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Analysis
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Fundraising
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Analysis
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Fundraising
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Analysis
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Fundraising

Task name	Task description	Functional area
Fundraising purpose revenue	View fundraising purpose revenue information.	Analysis
Fundraising purpose revenue	View fundraising purpose revenue information.	Fundraising
Generate MatchFinder updates	Create batch of organization updates from MatchFinder Online.	Revenue
Global pledge write-off	This task allows users to globally write-off pledges.	Revenue
Household settings	Provides an interface for managing household settings.	Constituents
Incremental duplicate search	Find duplicates in constituents added or updated since the last duplicate search.	Constituents
Indirect responses	View all indirect gifts for a marketing effort.	Marketing and Communications
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
Letter template library	Manage the letter template library.	Marketing and Communications
Life changes	Provides an interface for managing life changes within the system.	Constituents
List performance	Analyze list performance metrics including number of new donors, response rates, and ROI.	Marketing and Communications
List profile	View a detailed profile of a list.	Marketing and Communications
List summary	Detailed list report including metrics such as cost, total records, and expiration date.	Marketing and Communications
Major giving prospect search	Search for and view major giving prospect records.	Prospects
Manage correspondence	This task allows users to send correspondence to constituents.	Marketing and Communications
Manage modeling and propensity	Manage modeling and propensity ratings.	Prospects
Manage research groups	Create, populate and view research groups.	Prospects

Task name	Task description	Functional area
Mapping	Interactively map records based on their geographical locations.	Prospects
Marketing acknowledgements	Create and process marketing acknowledgements.	Marketing and Communications
Marketing record counts	View list use for a marketing effort.	Marketing and Communications
Marketing revenue	View total revenue for a marketing plan, appeal or marketing effort by day, week, month, or year.	Marketing and Communications
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Matching gift claim summary	View matching gift claim summary information.	Analysis
Matching gift claim summary	View matching gift claim summary information.	Revenue
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership count	View a reporting detailing the membership count of a particular program.	Analysis
Membership programs	View list of membership programs.	Fundraising
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership renewal efforts	Create and process membership renewal efforts.	Marketing and Communications
Membership revenue	Displays the membership revenue report	Analysis
Membership statistics comparison	Displays the membership statistics comparison report	Analysis
Merge two constituents	Manually merge two selected constituents.	Constituents

Task name	Task description	Functional area
Merged constituent search	Trace a merged constituent to the constituent into which it was merged.	Constituents
My fundraiser page	View my major giving area.	Prospects
Name format options	Provides an interface for managing name format options.	Marketing and Communications
Naming opportunity availability	View naming opportunity availability.	Analysis
Naming opportunity recognition	View naming opportunity recognitions.	Analysis
Naming opportunity search	Search for and view naming opportunities.	Fundraising
Notifications	Provides a user interface for managing notifications.	Administration
Opportunities	View major giving management opportunities and asks page.	Prospects
Opportunity pipeline	Displays the opportunity pipeline report.	Analysis
Organization calendar	View events, mailings, and other activities taking place across your organization.	Administration
Organization search	Search for and view organization constituent records.	Prospects
Organization search	Search for and view organization records.	Constituents
Origination settings	Configure constituent origination settings.	Constituents
Package performance	Displays package performance of a segment selection	Marketing and Communications
Plan income forecast	Expected income schedule by marketing effort for a plan.	Marketing and Communications
Plan status	Compare the actual results of marketing plans with their expected results.	Marketing and Communications
Planned gift acknowledgements	Process acknowledgements for planned gift records.	Marketing and Communications
Planned gift detail	Displays the planned gift detail report.	Analysis
Planned marketing profile	View a detailed profile of a planned marketing effort.	Marketing and Communications
Planner income outlook	Yearly overview of income expectations by plan.	Marketing and Communications

Task name	Task description	Functional area
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Pledge subtypes	Provides an interface for managing pledge subtypes.	Revenue
Projected income	View the projected income report.	Analysis
Projected income	View the projected income report.	Revenue
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Prospect plan analysis	Displays the prospect plan analysis report.	Analysis
Prospect plan follow-up	Displays the prospect plan follow-up report.	Analysis
Prospects	View major giving management prospects page.	Prospects
Purpose search	Search for and view fundraising purposes.	Fundraising
Query	Create and manage queries.	Analysis
Reason codes	Displays the page to manage reason codes.	Constituents
Reason codes	Displays the page to manage reason codes.	Revenue
Receipts	Process receipts for revenue records.	Marketing and Communications
Recognition count	View a report detailing the recognition count of a particular program.	Analysis
Recognition credits	View recognition credits and associated revenue records from the revenue functional area.	Revenue
Recognition credits	View recognition credits and associated revenue records.	Analysis
Recognition programs	View list of recognition programs.	Constituents
Recognition revenue	View a report detailing the recognition revenue of a particular program.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Analysis
Reconcile deposits	Reconcile revenue in the system with a bank deposit record.	Revenue
Reconcile matching gifts	Reconcile unapplied matching gift payments to existing or new unpaid matching gift claims.	Revenue
Recurring gift missed payments	View the missed recurring gift report.	Analysis

Task name	Task description	Functional area
Recurring gift missed payments	View the missed recurring gift report.	Revenue
Relationship settings	Provides an interface for managing relationship settings.	Constituents
Relationship types	Provides an interface for managing relationship types.	Records
Reminders	Generate reminders.	Marketing and Communications
Removed member counts	View the removed member counts for a marketing effort.	Marketing and Communications
Report explorer	Explore and run reports located on the Report Server.	Analysis
Reporting filters	Manage revenue filters.	Revenue
Retention and attrition	View retention and attrition by year for a segment.	Marketing and Communications
Revenue annual statement	View the revenue annual statement report.	Analysis
Revenue annual statement	View the revenue annual statement report.	Revenue
Revenue by payment method	View the revenue by payment method report.	Analysis
Revenue by payment method	View the revenue by payment method report.	Revenue
Revenue detail	View details of constituent giving.	Analysis
Revenue detail	View details of constituent giving.	Revenue
Revenue detail group/household	View details of group or household giving.	Analysis
Revenue detail group/household	View details of group or household giving.	Revenue
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Analysis
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits from the revenue functional area.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits.	Analysis

Task name	Task description	Functional area
Search MatchFinder Online	Identify matching gift organizations by searching MatchFinder Online.	Revenue
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Solicitor revenue	View revenue from solicitors over a specified period.	Analysis
Solicitor revenue	View revenue from solicitors over a specified period.	Fundraising
Source analysis response	Analyze response rates by source analysis value.	Marketing and Communications
Source code performance	Displays the source code performance for a selection of marketing efforts.	Marketing and Communications
Stewarded donor search	Search for and view stewarded donors.	Prospects
Title code defaults	Modify title code defaults.	Constituents
Transaction search	Search for and view revenue transaction records.	Revenue
Tribute acknowledgements	Task to manage your tribute acknowledgement processes.	Marketing and Communications
Tribute revenue	View tribute records with associated revenue.	Analysis
Tributes	Create and edit tributes.	Constituents
Unresolved responses	View all unresolved gifts for a marketing effort.	Marketing and Communications
Vendors	Manage information about the suppliers of items and services to your organization.	Marketing and Communications
View acquisition lists	Manage lists you purchase, or obtain internally or from other organizations.	Marketing and Communications
View creatives	Add and manage the items that make up your marketing effort packages, such as graphics or brochures.	Marketing and Communications
View marketing efforts	Manage all aspects of marketing efforts including packages, segments, analysis, and more.	Marketing and Communications
View marketing plans	Establish your estimates for costs and marketing efforts for the next year or another set time period.	Marketing and Communications

Task name	Task description	Functional area
View packages	Manage the different pieces available for all your marketing efforts.	Marketing and Communications
View segments	Manage the groupings of your prospects that enable you to target them.	Marketing and Communications
View selections	Manage the criteria used to filter records and create your marketing effort segments.	Marketing and Communications
Volunteer search	Search for and view volunteer records.	Volunteers
VSE survey	View the VSE Survey Report.	Analysis
Web dashboard	View personalized dashboards	Analysis

Email Alerts Role

Users assigned the Email alerts role have rights to configure and manage email alerts.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Application users	View the list of application users.	Administration
Business process ownership	View and edit business process owners.	Administration
Email alerts	Configure and manage email alert settings.	Administration

Email Services Administrator

Users in the Email services administrator role have rights to configure email services in *Administration*.

With this role, you can manage the processes used to send email through the program such as for communications and notifications. You can configure the connection to the server used to send email messages through the program and manage the email jobs for messages.

Task name	Task description	Functional area
Email services	Manages all email services functionality.	Administration
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
KPIs	Create, manage and schedule updates for KPIs.	Analysis

Email Services User

Users in the Email services user role can view email job status reports, details about email jobs, and blacklisted email addresses.

Task name	Task description	Functional area
Email services	Consumes email web services and views email processes and job statuses.	Administration

Event Manager

Users assigned the Event Manager role oversee the event planning, committee management, and recruitment at your organization. Users in this role can view data about volunteers and constituents, such as to plan an event and manage its registrants. An Event Manager user can also add and manage events and event registration payments and generate reports and KPIs to track the effectiveness of your events.

Task name	Task description	Functional area
Acknowledgements	Process acknowledgements for revenue records.	Marketing and Communications
Add a committee	Add a new committee.	Constituents
Add a group	Add a new group constituent.	Constituents
Add a multi-level event	Add a new multi-level event.	Events
Add a payment	Add a new payment.	Revenue
Add an event	Add a new event.	Events
Add an individual	Add a new individual constituent.	Constituents
Add an organization	Add a new organization constituent.	Constituents
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Volunteers
Blackbaud Payment Service merchant accounts	Provides an interface for managing Blackbaud Payment Service merchant accounts.	Revenue
Business process ownership	View and edit business process owners.	Administration

Task name	Task description	Functional area
Committee search	Search for and view committee records.	Constituents
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Default communication exclusions	Configure the default communication exclusions.	Marketing and Communications
Event attendance	View the event attendance report.	Analysis
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Event calendar	View the calendar of all events and tasks.	Events
Event comparison	View performance data for events	Analysis
Event comparison	View performance data for events	Events
Event management templates	Add or edit the available event management templates.	Events
Event profile	View a detailed profile of an event.	Analysis
Event profile	View a detailed profile of an event.	Events
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis
Event summary	View summary information for events.	Events
Events overview	View events and event tasks.	Events
Export	Create and manage exports of query results.	Administration
Household settings	Provides an interface for managing household settings.	Constituents

Task name	Task description	Functional area
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
KPIs	Create, manage and schedule updates for KPIs.	Analysis
Locations	Add or edit the available locations.	Events
Organization calendar	View events, mailings, and other activities taking place across your organization.	Administration
Organization search	Search for and view organization records.	Constituents
Query	Create and manage queries.	Analysis
Receipt and acknowledgement preferences	Configure the system receipt and acknowledgement preferences.	Marketing and Communications
Receipts	Process receipts for revenue records.	Marketing and Communications
Registration types	Add or edit the available registration types.	Events
Report explorer	Explore and run reports located on the Report Server.	Analysis
Revenue by payment method	View the revenue by payment method report.	Analysis
Revenue by payment method	View the revenue by payment method report.	Revenue
Revenue detail	View details of constituent giving.	Revenue
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Team fundraising by event	View team fundraising teams' revenue totals by event.	Analysis
Team fundraising by team	View team fundraising teams' revenue totals.	Analysis
Transaction search	Search for and view revenue transaction records.	Revenue
Tribute acknowledgements	Task to manage your tribute acknowledgement processes.	Marketing and Communications
Volunteer daily schedule	Show the daily schedule report for all volunteers.	Analysis
Volunteer search	Search for and view volunteer records.	Volunteers
Web dashboard	View personalized dashboards	Analysis

Executive Director

Users assigned the Executive Director role oversee the health and welfare of your organization. Users in this role can add and manage data about constituents and prospects and view data about events and revenue transactions. An Executive Director user can also generate reports and KPIs to track the effectiveness of your fundraising efforts.

Task name	Task description	Functional area
Activity	View the pledge and recurring gift activity report from revenue.	Revenue
Activity	View the pledge and recurring gift activity report.	Analysis
Add a fundraiser	Add a fundraiser from an existing or new constituent record.	Prospects
Add a group	Add a new group constituent.	Prospects
Add a household	Add a new household constituent.	Prospects
Add a major giving prospect	Add a major giving prospect from an existing or new constituent record.	Prospects
Add a stewardship plan	Provides an interface for adding a stewardship plan for a constituent.	Prospects
Add an individual	Add a new individual constituent.	Prospects
Add an organization	Add a new organization constituent.	Prospects
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal mailings	View all appeal mailings in the system.	Marketing and Communications
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Appeal search	Search for and view appeal records.	Marketing and Communications

Task name	Task description	Functional area
Assign prospects in bulk	Assign or reassign a large number of prospects to a fundraiser.	Prospects
Batch entry	Manage batches through all stages of the batch workflow.	Constituents
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch search	Search for and view batches.	Constituents
Batch search	Search for and view batches.	Revenue
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications
Communications analysis	View communication and appeal performance.	Marketing and Communications
Constituencies	Provides an interface for managing constituencies within the system.	Constituents
Constituent data review	Review changes made to constituent contact information.	Constituents
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent group types	Add, edit and delete constituent group types.	Prospects
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent recognition credits	View constituents with their associated recognition credits.	Analysis
Constituent recognition credits	View constituents with their associated recognition credits.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Constituent search	Search for and view constituent records.	Prospects
Constituent tributes	View constituents with their associated tributes.	Analysis
Constituent tributes	View constituents with their associated tributes.	Constituents

Task name	Task description	Functional area
Designation progress	View progress of selected designations within a hierarchy.	Analysis
Designation progress	View progress of selected designations within a hierarchy.	Fundraising
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constituent search.	Constituents
Event attendance	View the event attendance report.	Analysis
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Analysis
FEP benchmarking comparison	View the FEP Benchmarking Comparison report.	Fundraising
Fundraiser search	Search for and view fundraiser records.	Prospects
Fundraisers and steps	View major giving management fundraisers and steps page.	Prospects
Fundraising Effectiveness Project	Create and submit a file to AFP to participate in the Fundraising Effectiveness Project.	Administration
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Analysis
Fundraising hierarchy progress	View detailed designation progress against goals within a hierarchy.	Fundraising
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Analysis
Fundraising hierarchy summary	View designation progress by quarter or year against goals within a hierarchy.	Fundraising
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Analysis
Fundraising purpose profile	View a detailed profile of fundraising purpose.	Fundraising

Task name	Task description	Functional area
Fundraising purpose revenue	View fundraising purpose revenue information.	Analysis
Fundraising purpose revenue	View fundraising purpose revenue information.	Fundraising
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
Major giving prospect search	Search for and view major giving prospect records.	Prospects
Manage correspondence	This task allows users to send correspondence to constituents.	Marketing and Communications
Manage modeling and propensity	Manage modeling and propensity ratings.	Prospects
Manage research groups	Create, populate and view research groups.	Prospects
Mapping	Interactively map records based on their geographical locations.	Prospects
Marketing revenue	View total revenue for a marketing plan, appeal or marketing effort by day, week, month, or year.	Marketing and Communications
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership programs	View list of membership programs.	Fundraising
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership revenue	Displays the membership revenue report	Analysis
My fundraiser page	View my major giving area.	Prospects
Naming opportunity availability	View naming opportunity availability.	Analysis

Task name	Task description	Functional area
Naming opportunity recognition	View naming opportunity recognitions.	Analysis
Notifications	Provides a user interface for managing notifications.	Administration
Opportunities	View major giving management opportunities and asks page.	Prospects
Opportunity pipeline	Displays the opportunity pipeline report.	Analysis
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Organization search	Search for and view organization constituent records.	Prospects
Organization search	Search for and view organization records.	Constituents
Origination settings	Configure constituent origination settings.	Constituents
Plan income forecast	Expected income schedule by marketing effort for a plan.	Marketing and Communications
Plan status	Compare the actual results of marketing plans with their expected results.	Marketing and Communications
Planned gift acknowledgements	Process acknowledgements for planned gift records.	Marketing and Communications
Planned gift detail	Displays the planned gift detail report.	Analysis
Planned marketing profile	View a detailed profile of a planned marketing effort.	Marketing and Communications
Planner income outlook	Yearly overview of income expectations by plan.	Marketing and Communications
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Projected income	View the projected income report.	Analysis
Projected income	View the projected income report.	Revenue
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Prospect plan analysis	Displays the prospect plan analysis report.	Analysis
Prospect plan follow-up	Displays the prospect plan follow-up report.	Analysis
Prospects	View major giving management prospects page.	Prospects
Purpose search	Search for and view fundraising purposes.	Fundraising

Task name	Task description	Functional area
Reason codes	Displays the page to manage reason codes.	Revenue
Recognition credits	View recognition credits and associated revenue records from the revenue functional area.	Revenue
Recognition credits	View recognition credits and associated revenue records.	Analysis
Recognition programs	View list of recognition programs.	Constituents
Recognition revenue	View a report detailing the recognition revenue of a particular program.	Analysis
Relationship settings	Provides an interface for managing relationship settings.	Constituents
Relationship types	Provides an interface for managing relationship types.	Records
Report explorer	Explore and run reports located on the Report Server.	Analysis
Revenue annual statement	View the revenue annual statement report.	Revenue
Revenue detail	View details of constituent giving.	Analysis
Revenue detail	View details of constituent giving.	Revenue
Revenue detail group/household	View details of group or household giving.	Analysis
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Analysis
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Revenue recognition credits	View revenue entries with associated recognition credits.	Analysis
Sales	View the sales report.	Analysis
Sales by payment method	View sales grouped by payment method.	Analysis
Sales comparison	View the sales comparison report.	Analysis
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Solicitor revenue	View revenue from solicitors over a specified period.	Analysis
Solicitor revenue	View revenue from solicitors over a specified period.	Fundraising
Stewarded donor search	Search for and view stewarded donors.	Prospects

Task name	Task description	Functional area
Tribute revenue	View tribute records with associated revenue.	Analysis
Tributes	Create and edit tributes.	Constituents
Web dashboard	View personalized dashboards	Analysis

Fundraiser on the Go Role

The Fundraiser on the Go role allows users to copy the Fundraiser on the Go URL in *Prospects* and to access *Fundraiser on the Go* from a mobile device.

Note: To use *Fundraiser on the Go*, a fundraiser must be added to this role, have the "Fundraiser" constituency on their constituent record, and be linked to an active fundraiser.

Global Change Role

Users in this role can use the **Global changes** feature in *Administration* to make select changes to a specific group of records in your system. For example, you can run a process to add or delete attributes on large groups of constituent records at one time.

Task name	Task description	Functional area
Global changes	Create and manage global change instances	Administration

Group Sales Coordinator

Users assigned this role handle all aspects of group sales, including booking group reservations, generating contracts, building itineraries, processing payments, and checking groups in when they arrive. Users in this role can also search for and add constituents, as well as run queries, and configure equipment and staff resources.

Task name	Task description	Functional area
Add a daily admission program	Add a daily admission program.	Tickets
Add a group	Add a new group constituent.	Constituents
Add a household	Add a new household constituent.	Constituents

Task name	Task description	Functional area
Add a scheduled program	Add a scheduled program.	Tickets
Add an individual	Add a new individual constituent.	Constituents
Add an organization	Add a new organization constituent.	Constituents
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Tickets
Approve reconciliation	Approve ticket seller reconciliations and create deposits.	Sales
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent search	Search for and view constituent records.	Constituents
Daily reservation	View the daily reservation report.	Tickets
Daily schedule	View a list of a given day's events.	Tickets
Event attendance	View the event attendance report.	Analysis
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Group check in	Provides the ability to check in groups.	Sales
Group check out	Provides the ability to check out groups.	Sales
Group sales	Make reservations for groups.	Sales
Group sales setup	Prepare the system for group sales.	Tickets
Itinerary	View the itinerary report.	Analysis
Itinerary	View the itinerary report.	Sales
Letter template library	Manage the letter template library.	Marketing and Communications
Locations	Manage locations.	Tickets

Task name	Task description	Functional area
No sale/open cash drawer	Manually open cash drawer.	Sales
Orders with balance due	View the orders with balance due report.	Analysis
Orders with balance due	View the orders with balance due report.	Sales
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Organization search	Search for and view organization records.	Constituents
Price lists	Manage price lists.	Tickets
Print setup	Prepare the system to print sales documents.	Tickets
Printer lists	Manage printer lists.	Tickets
Program search	Search for and view program records.	Tickets
Query	Create and manage queries.	Analysis
Reconcile sales	At the end of your shift, count the final cash amount and reconcile sales.	Sales
Reservations by group type	View the reservations by group type report.	Analysis
Reservations by group type	View the reservations by group type report.	Sales
Resources	Manage resources.	Tickets
Review sales deposits	Create deposits associated with sales.	Sales
Sales dashboard	View the sales web dashboard.	Sales
Sales documents	Manage sales document templates.	Tickets
Sales methods	Manage sales methods.	Tickets
Schedule program events	Schedule events for a program.	Tickets
Scheduled event ticket detail	View the scheduled event ticket detail report.	Analysis
Ticket and merchandise discounts	List all discounts.	Merchandise - Beta
Ticket and merchandise discounts	List all discounts.	Tickets
Workstations	Manage workstations.	Tickets

Guest Services Manager

Users assigned this role are responsible for configuring ticketing in the system, which includes building the scheduled programs, program events, admission programs, and combinations that you sell. Users in this role also define pricing, discounts, fees, taxes, locations, and resources, as well as configure workstations, set up printing, and configure cash drawers. Additionally, users assigned this role can run ticketing reports and queries, perform sales and refund processes, approve ticket seller reconciliations, and create deposits.

Task name	Task description	Functional area
Active membership	View active membership report.	Analysis
Active membership	View active membership report.	Tickets
Add a daily admission program	Add a daily admission program.	Tickets
Add a scheduled program	Add a scheduled program.	Tickets
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Adjustable discount	View the adjustable discount report.	Sales
Advance sales	Sell tickets with a sales screen optimized for future ticket sales.	Sales
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Analysis
Altru training page	Altru training page.	Sales
Altru training page	Altru training page.	Tickets
Approve reconciliation	Approve ticket seller reconciliations and create deposits.	Sales
Average hourly sales	View the average hourly sales report.	Analysis
Average hourly sales	View the average hourly sales report.	Sales
Basic duplicate constituent report	View a report of possible duplicate constituents found by user defined search criteria.	Constituents
Benefits list	Displays a report listing all constituent benefits within a particular date range.	Analysis
Combinations	List all combinations.	Tickets

Task name	Task description	Functional area
Configure daily sales page	Add, edit, or delete sales buttons on the daily sales page.	Tickets
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Count initial cash	At the start of your shift, count the initial cash in the drawer.	Sales
Create online sales deposits	Create sales deposits for online sales.	Sales
Daily admission	View daily admission report.	Sales
Daily reservation	View the daily reservation report.	Tickets
Daily sales	Sell tickets with a sales screen optimized for the front desk staff.	Sales
Daily schedule	View a list of a given day's events.	Tickets
Delivery methods	Manage delivery methods.	Tickets
Discount	View the discount report.	Analysis
Discount	View the discount report.	Sales
Event attendance	View the event attendance report.	Analysis
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event profile	View a detailed profile of an event.	Events
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis
Event summary	View summary information for events.	Events
Fee	View the fee report.	Sales
Fees	Manage fees.	Tickets
Full duplicate search	Search the entire database for duplicate constituents.	Constituents
Group check in	Provides the ability to check in groups.	Sales
Group check out	Provides the ability to check out groups.	Sales

Task name	Task description	Functional area
Incremental duplicate search	Find duplicates in constituents added or updated since the last duplicate search.	Constituents
Inventory	View the inventory report.	Analysis
Inventory	View the inventory report.	Merchandise - Beta
Itinerary	View the itinerary report.	Sales
Locations	Manage locations.	Tickets
Marketing survey	View the marketing survey report.	Sales
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership count	View a reporting detailing the membership count of a particular program.	Analysis
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership promotions	List all membership promotions.	Tickets
Membership renewal	Displays the membership renewal report	Analysis
Membership reports	Help video explaining membership reports.	Analysis
Membership revenue	Displays the membership revenue report	Analysis
Membership statistics comparison	Displays the membership statistics comparison report	Analysis
Merchandise sales	View the merchandise sales report.	Analysis
Merchandise sales	View the merchandise sales report.	Merchandise - Beta
Merchandise sales	View the merchandise sales report.	Sales
Merge two constituents	Manually merge two selected constituents.	Constituents
My sales by payment method	View sales grouped by payment method.	Analysis
My sales by payment method	View sales grouped by payment method.	Sales
No sale/open cash drawer	Manually open cash drawer.	Sales

Task name	Task description	Functional area
Notifications	Provides a user interface for managing notifications.	Administration
Order search	Search for and view completed orders.	Sales
Orders with balance due	View the orders with balance due report.	Analysis
Orders with balance due	View the orders with balance due report.	Sales
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Organization information	Manage organization information.	Tickets
Payment methods	Manage custom payment method options.	Tickets
Pick up tickets	Search for and complete orders requiring payment on arrival and/or printing.	Sales
Point of sale donations	Manage donation defaults and availability to sales methods.	Tickets
Preregistered program check in	Mark who's attended a preregistered program.	Sales
Preregistered program roster	View the preregistered program roster.	Analysis
Price lists	Manage price lists.	Tickets
Print membership cards	Print membership cards.	Fundraising
Print setup	Prepare the system to print sales documents.	Tickets
Printer lists	Manage printer lists.	Tickets
Program calendar	View all events.	Tickets
Program search	Search for and view program records.	Tickets
Query	Create and manage queries.	Analysis
Reconcile sales	At the end of your shift, count the final cash amount and reconcile sales.	Sales
Refund search	Search for and view refunds.	Sales
Refunds	Return items to refund money back to a patron or return free tickets to inventory.	Sales
Reservations by group type	View the reservations by group type report.	Analysis

Task name	Task description	Functional area
Reservations by group type	View the reservations by group type report.	Sales
Resources	Manage resources.	Tickets
Review sales deposits	Create deposits associated with sales.	Sales
Sales	View a list of sales figures.	Sales
Sales	View the sales report.	Analysis
Sales by date	View sales by date report.	Sales
Sales by membership	View a list of sales figures broken down by membership level.	Sales
Sales by membership report	View the membership sales report.	Analysis
Sales by payment method	View sales grouped by payment method.	Analysis
Sales by payment method	View sales grouped by payment method.	Sales
Sales by price type	View sales broken down by price type.	Sales
Sales by price type	View the price type sales report.	Analysis
Sales by program	View the sales by program report.	Sales
Sales comparison	View a comparison of sales figures between two periods of time.	Sales
Sales comparison	View the sales comparison report.	Analysis
Sales dashboard	View the sales web dashboard.	Sales
Sales documents	Manage sales document templates.	Tickets
Sales methods	Manage sales methods.	Tickets
Schedule program events	Schedule events for a program.	Tickets
Scheduled event ticket detail	View the scheduled event ticket detail report.	Analysis
Tax	View the tax report.	Sales
Taxes	Manage taxes.	Tickets
Ticket and merchandise discounts	List all discounts.	Merchandise - Beta
Ticket and merchandise discounts	List all discounts.	Tickets

Task name	Task description	Functional area
Ticket availability	View ticket availability for scheduled events.	Sales
Ticket sales setup	Prepare the system to sell tickets.	Tickets
Unmapped general ledger items	View the unmapped general ledger items report.	Tickets
Unresolved online sales orders	Review and resolve online sales orders with conflicts.	Sales
Unscheduled events conflict	View scheduling conflicts.	Tickets
Workstations	Manage workstations.	Tickets
Zip code	View Zip code marketing data.	Sales

Import Selections

Users in this role can view selections, view and create exports, and import new selections.

Task name	Task description	Functional area
View selections	View information about selections	Administration
Import selections	Import ID information to create selections	Administration

Marketing Manager

Users assigned to the Marketing manager role are responsible for communications that convince people to come visit, become members, donate, and become volunteers. They have access to all marketing features as well as other important areas of the program.

Task name	Task description	Functional area
Acknowledgements	Process acknowledgements for revenue records.	Marketing and Communications
Active membership	View active membership report.	Analysis
Active membership	View active membership report.	Tickets

Task name	Task description	Functional area
Add a direct marketing effort	Add a new direct marketing effort.	Marketing and Communications
Add a public media effort	Add a new public media marketing effort.	Marketing and Communications
Add an appeal	Add a new appeal.	Marketing and Communications
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Adjustable discount	View the adjustable discount report.	Analysis
Adjustable discount	View the adjustable discount report.	Sales
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Analysis
Altru training page	Altru training page.	Sales
Altru training page	Altru training page.	Tickets
Appeal Mailing performance	View the appeal mailing performance report.	Analysis
Appeal mailings	View all appeal mailings in the system.	Marketing and Communications
Appeal package performance	View performance data for appeals and packages.	Analysis
Appeal search	Search for and view appeal records.	Marketing and Communications
Average hourly sales	View the average hourly sales report.	Analysis
Average hourly sales	View the average hourly sales report.	Sales
Business process ownership	View and edit business process owners.	Administration
Change password	Change your system password.	Administration
Combinations	List all combinations.	Tickets
Constituent data review	Review changes made to constituent contact information.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents

Task name	Task description	Functional area
Constituent search	Search for and view constituent records.	Constituents
Constituent tributes	View constituents with their associated tributes.	Analysis
Daily admission	View daily admission report.	Analysis
Daily admission	View daily admission report.	Sales
Daily reservation	View the daily reservation report.	Tickets
Daily schedule	View a list of a given day's events.	Tickets
Default communication exclusions	Configure the default communication exclusions.	Marketing and Communications
Discount	View the discount report.	Analysis
Discount	View the discount report.	Sales
Event calendar	View the calendar of all events and tasks.	Events
Event profile	View a detailed profile of an event.	Analysis
Event profile	View a detailed profile of an event.	Events
Event search	Search for and view event records.	Events
Event summary	View summary information for events.	Analysis
Event summary	View summary information for events.	Events
Events overview	View events and event tasks.	Events
Export	Create and manage exports of query results.	Administration
Fee	View the fee report.	Analysis
Fee	View the fee report.	Sales
Finder number settings	Change the next generated finder number or increase the fixed width.	Marketing and Communications
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
KPIs	Create, manage and schedule updates for KPIs.	Analysis
Marketing effort search	Search for a marketing effort.	Marketing and Communications

Task name	Task description	Functional area
Marketing survey	View the marketing survey report.	Analysis
Marketing survey	View the marketing survey report.	Sales
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership count	View a reporting detailing the membership count of a particular program.	Analysis
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership reports	Help video explaining membership reports.	Analysis
Membership revenue	Displays the membership revenue report	Analysis
Membership statistics comparison	Displays the membership statistics comparison report	Analysis
Notifications	Provides a user interface for managing notifications.	Administration
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Preregistered program check in	Mark who's attended a preregistered program.	Sales
Preregistered program roster	View the preregistered program roster.	Analysis
Preregistered program roster	View the preregistered program roster.	Sales
Price lists	Manage price lists.	Tickets
Program calendar	View all events.	Tickets
Query	Create and manage queries.	Analysis
Receipt and acknowledgement preferences	Configure the system receipt and acknowledgement preferences.	Marketing and Communications

Task name	Task description	Functional area
Receipts	Process receipts for revenue records.	Marketing and Communications
Registration types	Add or edit the available registration types.	Events
Revenue detail	View details of constituent giving.	Analysis
Sales	View a list of sales figures.	Sales
Sales	View the sales report.	Analysis
Sales by date	View sales by date report.	Sales
Sales by membership	View a list of sales figures broken down by membership level.	Sales
Sales by membership report	View the membership sales report.	Analysis
Sales by price type	View sales broken down by price type.	Sales
Sales by price type	View the price type sales report.	Analysis
Sales by program	View the sales by program report.	Sales
Sales comparison	View a comparison of sales figures between two periods of time.	Sales
Sales comparison	View the sales comparison report.	Analysis
Sales dashboard	View the sales web dashboard.	Sales
Scheduled event ticket detail	View the scheduled event ticket detail report.	Analysis
Smart query browse	Browse smart query definitions.	Analysis
Tax	View the tax report.	Analysis
Tax	View the tax report.	Sales
Ticket and merchandise discounts	List all discounts.	Merchandise - Beta
Ticket and merchandise discounts	List all discounts.	Tickets
Ticket availability	View ticket availability for scheduled events.	Analysis
Ticket availability	View ticket availability for scheduled events.	Sales

Task name	Task description	Functional area
Tribute acknowledgements	Task to manage your tribute acknowledgement processes.	Marketing and Communications
Tribute revenue	View tribute records with associated revenue.	Analysis
View marketing efforts	Manage all aspects of marketing efforts including packages, segments, analysis, and more.	Marketing and Communications
Web dashboard	View personalized dashboards	Analysis
Zip code	View Zip code marketing data.	Sales

Membership Manager

Users assigned the Membership Manager role plan and analyze the membership program at your organization and solicit constituents to join as members. Users in this role can manage membership mailings and view data about volunteers and constituents, such as to manage and solicit members. A Membership Manager user can also print membership cards, add and manage membership fee payments, and generate reports and KPIs to track the effectiveness of your fundraising efforts.

Task name	Task description	Functional area
Add a group	Add a new group constituent.	Constituents
Add a mail package	Add the different pieces available for direct marketing efforts.	Marketing and Communications
Add a membership email	Add a new email based on a membership export definition.	Marketing and Communications
Add a membership letter	Add a new membership letter.	Marketing and Communications
Add a membership segment	Add a new membership segment.	Marketing and Communications
Add a payment	Add a new payment.	Revenue
Add a selection	Add a new ad-hoc query selection.	Marketing and Communications
Add an appeal	Add a new appeal.	Marketing and Communications
Add an email package	Add the different pieces available for direct marketing email efforts.	Marketing and Communications

Task name	Task description	Functional area
Add an individual	Add a new individual constituent.	Constituents
Add an organization	Add a new organization constituent.	Constituents
Address processing options	View and manage the list of address processing option sets.	Marketing and Communications
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Fundraising
Altru training page	Altru training page.	Marketing and Communications
Appeal package performance	View performance data for appeals and packages.	Analysis
Appeal performance	View performance data for a group of appeals.	Analysis
Appeal performance	View performance data for a group of appeals.	Marketing and Communications
Appeal profile	View a detailed profile of an appeal.	Analysis
Appeal profile	View a detailed profile of an appeal.	Marketing and Communications
Appeal search	Search for and view appeal records.	Marketing and Communications
Ask ladder response	Analyze the response rates of ask ladders.	Marketing and Communications
Average gift comparison	Compare average gift amounts for different segments over a span of years.	Marketing and Communications
Benefits list	Displays a report listing all constituent benefits within a particular date range.	Analysis
Business process ownership	View and edit business process owners.	Administration
Breakeven analysis	Compare the performance of each segment in a marketing effort.	Marketing and Communications
Campaign recognition credit	View a campaign's recognition credits.	Analysis
Campaign summary	View a campaign summary.	Analysis

Task name	Task description	Functional area
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent group types	Add, edit and delete constituent group types.	Constituents
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent matching settings	Modify the settings used to identify duplicate records when adding a new record.	Administration
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Default communication exclusions	Configure the default communication exclusions.	Marketing and Communications
Email search	Search for an email.	Marketing and Communications
Event revenue	View revenue data for a specific event.	Analysis
Export	Create and manage exports of query results.	Administration
Export definitions	Create and manage export definitions for marketing efforts.	Marketing and Communications
Export definitions	Create and manage export definitions.	Administration
Finder file counts	View the finder file counts for a marketing effort.	Marketing and Communications
Hierarchical campaign summary	View a campaign hierarchy summary.	Analysis
Household settings	Provides an interface for managing household settings.	Constituents
Indirect responses	View all indirect gifts for a marketing effort.	Marketing and Communications
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
KPI dashboard	View a customizable dashboard of KPI values and statistics.	Analysis
KPIs	Create, manage and schedule updates for KPIs.	Analysis

Task name	Task description	Functional area
Letter search	Search for a letter.	Marketing and Communications
Letter template library	Manage the letter template library.	Marketing and Communications
List performance	Analyze list performance metrics including number of new donors, response rates, and ROI.	Marketing and Communications
List profile	View a detailed profile of a list.	Marketing and Communications
List summary	Detailed list report including metrics such as cost, total records, and expiration date.	Marketing and Communications
Marketing acknowledgements	Create and process marketing acknowledgements.	Marketing and Communications
Marketing record counts	View list use for a marketing effort.	Marketing and Communications
Marketing summary	Summary of all marketing efforts in the system.	Marketing and Communications
Membership appeals	View membership revenue associated with appeals.	Analysis
Membership conversion	Displays the membership conversion report	Analysis
Membership count	View a reporting detailing the membership count of a particular program.	Analysis
Membership program	View the membership program.	Fundraising
Membership programs	View list of membership programs.	Fundraising
Membership projected revenue	Displays the membership projected revenue report	Analysis
Membership promotions	List all membership promotions.	Fundraising
Membership renewal	Displays the membership renewal report	Analysis
Membership renewal effort	View renewal statistics for a membership renewal effort.	Analysis
Membership renewal efforts	Create and process membership renewal efforts.	Marketing and Communications

Task name	Task description	Functional area
Membership reports	Help video explaining membership reports.	Analysis
Membership revenue	Displays the membership revenue report	Analysis
Membership statistics comparison	Displays the membership statistics comparison report	Analysis
Name format options	Provides an interface for managing name format options.	Marketing and Communications
Notifications	Provides a user interface for managing notifications.	Administration
Organization calendar	View events, mailings, and other activities taking place across your organization.	Administration
Organization search	Search for and view organization records.	Constituents
Package performance	Displays package performance of a segment selection	Marketing and Communications
Page designer	Edit the appearance and format of your web forms.	Web
Planning calendar	View calendar of organization activity to help plan your communications.	Marketing and Communications
Print membership cards	Print membership cards.	Fundraising
Privacy policy	Edit the web page that displays your privacy policy.	Web
Query	Create and manage queries.	Analysis
Recognition count	View a report detailing the recognition count of a particular program.	Analysis
Recognition revenue	View a report detailing the recognition revenue of a particular program.	Analysis
Removed member counts	View the removed member counts for a marketing effort.	Marketing and Communications
Reporting filters	Manage revenue filters.	Revenue
Retention and attrition	View retention and attrition by year for a segment.	Marketing and Communications
Revenue by payment method	View the revenue by payment method report.	Analysis
Revenue by payment method	View the revenue by payment method report.	Revenue

Task name	Task description	Functional area
Revenue detail	View details of constituent giving.	Revenue
Revenue dynamics	Compare constituent gift revenue activity for two periods of time.	Revenue
Segmented house file counts	View the segmented house file counts for a marketing effort.	Analysis
Segmented house file counts	View the segmented house file counts for a marketing effort.	Marketing and Communications
Selection brief	View a detailed profile of a marketing effort.	Marketing and Communications
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Source analysis response	Analyze response rates by source analysis value.	Marketing and Communications
Source code performance	Displays the source code performance for a selection of marketing efforts.	Marketing and Communications
Source codes	Manage source code layouts to be used in marketing efforts.	Marketing and Communications
Transaction search	Search for and view revenue transaction records.	Revenue
Undelivered email	Undelivered email jobs.	Administration
Unresolved responses	View all unresolved gifts for a marketing effort.	Marketing and Communications
View creatives	Add and manage the items that make up your marketing effort packages, such as graphics or brochures.	Marketing and Communications
View emails	Add and manage emails created from export definitions.	Marketing and Communications
View letters and documents	Add and manage the letters and documents associated with your packages and marketing efforts.	Marketing and Communications
View marketing efforts	Manage all aspects of marketing efforts including packages, segments, analysis, and more.	Marketing and Communications
View packages	Manage the different pieces available for all your marketing efforts.	Marketing and Communications

Task name	Task description	Functional area
View segments	Manage the groupings of your prospects that enable you to target them.	Marketing and Communications
View selections	Manage the criteria used to filter records and create your marketing effort segments.	Marketing and Communications
View white mail segments	Manage your white mail segments.	Marketing and Communications
Volunteer daily schedule	Show the daily schedule report for all volunteers.	Analysis
Volunteer search	Search for and view volunteer records.	Volunteers
Web dashboard	View personalized dashboards	Analysis

Print a Membership Card Role

Use this system role to provide selected ticket sellers the ability to print membership cards in advance or daily sales without giving them full access to membership features. Users in this role can search for a member, open a membership record, and print a one-off membership card. The role does not allow for batch printing.

Prospect Manager

Prospects helps you track potential donors to your organization. In ***Altru***, you use *Prospects* to house plans and attributes associated with prospective donors. From here, you can also track prospect managers and prospect teams assigned this prospect.

The Prospect Manager role gives users rights to specific features in *Prospects*.

If you use ***ResearchPoint*** with ***Altru***, see Prospect Research on page 86 and Prospect Research Manager on page 88

Task name	Task description	Functional area
Opportunity pipeline	Displays the opportunity pipeline report	Analysis
Information library	Provides a centralized location for analyzing and sharing data	Analysis
Solicitor revenue	View revenue from solicitors over a specified period	Analysis
Prospect plan analysis	Displays the prospect plan analysis report	Analysis
Prospect plan follow-up	Displays the prospect plan follow-up report	Analysis

Task name	Task description	Functional area
Organization search	Search for and view organization records	Constituents
Constituent search	Search for and view individual records	Constituents
Add an organization	Add a new organization constituent.	Constituents
Constituent profile	View a detailed profile of a constituent	Constituents
Add a group	Add a new group constituent.	Constituents
Add an individual	Add a new individual constituent.	Constituents
Interaction categories and subcategories	Provides an interface for managing interaction categories and interaction within the system	Marketing and Communications
Response categories and responses	Provides an interface for managing response categories and responses within the system	Marketing and Communications
Search major giving prospects	Search for and view major giving prospect records	Prospects
Define likelihood percentages	Manage likelihood percentages	Prospects
Add a major giving prospect	Add a major giving prospect from an existing or new constituent record	Prospects
My fundraiser page	View my prospect management tasks	Prospects
Prospect plan follow-up	Displays the prospect plan follow-up report	Prospects
Opportunity pipeline	Displays the opportunity pipeline report	Prospects
Major giving setup	Establish and maintaining major giving methodologies	Prospects
Assign prospects in bulk	Assign or reassign a large number of prospects to a fundraiser	Prospects
Search fundraisers	Search for and view fundraiser records	Prospects
Prospect plan analysis	Displays the prospect plan analysis report	Prospects
Add a fundraiser	Add a fundraiser from an existing or new constituent record	Prospects

Prospect Research

The main system role in ***ResearchPoint***, this role grants users access to features used to determine prospect qualifications. Rights include but are not limited to adding, editing, and managing constituent records; searching for Wealth Information; importing and exporting data; and using advance features such as Mapping and Prospect Analysis dashboards.

Task name	Task description	Functional area
Add a group	Add a new group constituent.	Prospects
Add a household	Add a new household constituent.	Prospects
Add a prospect research request	Add a new prospect research request.	Prospects
Add an individual	Add a new individual constituent.	Prospects
Add an organization	Add a new organization constituent.	Prospects
Ad-hoc query search	Search for an ad-hoc query and view the results.	Analysis
Batch entry	Manage batches through all stages of the batch workflow.	Administration
Community	Launch browser and participate in ResearchPoint Community blogs, user forums, and Idea Bank.	Prospects
Constituent density map	Create a heat map of selected constituent addresses to help determine the location of most prospects.	Mapping
Constituent search	Search for and view constituent records.	Prospects
Export	Create and manage exports of query results.	Administration
Import	Create and manage imports into batch.	Administration
Manage research groups	Create, populate and view research groups.	Prospects
Mapping	Interactively map records based on their geographical locations.	Prospects
My prospect research page	View my prospect research area.	Prospects
Organization search	Search for and view organization constituent records.	Prospects
Product news	Launch browser to read about ResearchPoint product news, release notes, and The Prospector.	Prospects
Prospect analysis	Analyze and segment prospects based on data modeling.	Prospects
Prospect Quick Search	Search for new prospects using partial information.	Prospects
Query	Create and manage queries.	Analysis
Search The Raiser's Edge	Search for a Raiser's Edge constituent to add or link.	Prospects
Target Analytics events	Launch browser and learn about upcoming Target Analytics webinars, seminars, and conferences.	Prospects
The Raiser's Edge integration	Configure the settings for integration with The Raiser's Edge.	Prospects

Task name	Task description	Functional area
Training	Launch browser and open the ResearchPoint eLearning Library to view training videos.	Prospects
User guides	Launch browser to view the ResearchPoint Admin, Data, and Prospect Management Guides.	Prospects
Wealth and ratings data	Configure WealthPoint searches and ratings.	Prospects
Wealth capacity formula management	Manage wealth capacity formulas.	Prospects
Match settings (batch/import)	Set constituent match settings	Batch and Import

Prospect Research Manager

This ***ResearchPoint*** role grants administrative tasks not included in the Prospect Research role. It is especially useful for larger organizations. This role allows users to add new users, manage code tables, and access additional configuration settings.

Task name	Task description	Functional area
Application user search	Search for and view application user records.	Administration
Application users	View the list of application users.	Administration
Attribute categories	Provides a user interface for managing attribute categories.	Administration
Business processes	View the list of business process runs.	Administration
Business process ownership	View and edit business process owners.	Administration
Code tables	View the list of code tables and table entries.	Administration
Constituent group types	Add, edit and delete constituent group types.	Prospects
Countries and states	Configure system countries and states.	Administration
Educational catalog	Create and manage the academic catalog and educational institutions.	Administration
Email alerts	Configure and manage email alert settings.	Administration
Enable/disable phone formatting	Enables or disables phone number formatting on add and edit forms.	Administration

Task name	Task description	Functional area
First names	Modify first names table.	Prospects
Global changes	Create and manage global change instances.	Administration
Mapping	This task is used to configure mapping.	Administration
Notifications	Provides a user interface for managing notifications.	Administration
Organizational units	Manage the Active Directory organizational units associated with the system.	Administration
Queue	Allows for managing queue business processes.	Administration
Reason codes	Displays the page to manage reason codes.	Prospects
Relationship types	Provides an interface for managing relationship types.	Prospects
System roles	Manage system level permissions.	Administration
Title code defaults	Modify title code defaults	Prospects
Match settings (admin)	Set constituent match settings	Administration
Match settings (batch/import)	Set constituent match settings	Batch and Import

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 celebrities.

Note: The Restrict Contact Tab role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted 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.

Note: The Restrict Personal Information tab role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

Restrict My Sales by Payment Method Report

This system role prohibits a user from running the My Sales by Payment Method report. Denying access to this report provides a safe guard to prevent ticket sellers from potentially making adjustments to their drawer at the end of the day to match the total on the report.

Note: The Restrict My Sales by Payment Method Report role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

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.

Note: The Restrict Smart Fields role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

Restricted Constituent Attributes

This system role prevents users from viewing the Attributes tab on constituent records. For example, a user may need to update addresses and phone numbers on constituent records, but does not need to view information on the Attributes tab.

Note: The Restricted Constituent Attributes role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

Restricted Constituent Documentation and Interactions

This system role prevents users from viewing the Constituent Documentation and Interactions tab on constituent records. For example, a user may need to update addresses and phone numbers on constituent records, but does not need to view sensitive information on the Constituent Documentation and Interactions tab.

Note: The Restricted Constituent Documentation and Interactions role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

Restricted Constituent Revenue

This system role prevents users from viewing a constituent's giving history. For example, you may want to restrict this information from ticket sellers or volunteers who perform data entry.

Users in this role cannot view revenue, pledges, or appeals on individual and household constituent records. They are also limited to only viewing reports that include summarized or totaled revenue data.

Note: The Restricted Constituent Revenue role must be used in combination with other roles because it does not grant any features by itself; it only denies features that are granted by other roles.

Smart Fields

Users in the Smart Fields system role can add and modify smart fields and their business processes. They also have rights to assign access to specific smart fields to other users. For more information, see Assign Smart Field Permissions to a System Role on page 14

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Business process ownership	View and edit business process owners.	Administration
Smart fields	Provides a user interface for managing smart fields.	Administration
System roles	Manage system level permissions.	Administration

System Role Administrator

System role administrators have the highest level of security in your organization. They can add and manage user account records and assign users to system roles.

Task name	Task description	Functional area
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Application user search	Search for and view application user records.	Administration
Application users	View the list of application users.	Administration
Business process ownership	View and edit business process owners.	Administration
System roles	Manage system level permissions.	Administration

Ticket Seller

Users assigned this role can manually open their cash drawer, count initial cash, sell scheduled event and admission tickets, close their cash drawer, and reconcile sales. Users in this role can also search for orders, complete pay on arrival orders, and print or reprint sales documents and tickets. Additionally, users assigned this role can process refunds, check-in groups and view the itinerary report for groups.

Task name	Task description	Functional area
Advance sales	Sell tickets with a sales screen optimized for future ticket sales.	Sales
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Sales
Count initial cash	At the start of your shift, count the initial cash in the drawer.	Sales
Daily reservation	View the daily reservation report.	Tickets
Daily sales	Sell tickets with a sales screen optimized for the front desk staff.	Sales
Daily schedule	View a list of a given day's events.	Tickets
Event attendance	View the event attendance report.	Events
Event attendance	View the event attendance report.	Sales
Event attendance detail	View the event attendance report.	Analysis
Group check in	Provides the ability to check in groups.	Sales
Group check out	Provides the ability to check out groups.	Sales
Itinerary	View the itinerary report.	Sales
My sales by payment method	View sales grouped by payment method.	Sales
No sale/open cash drawer	Manually open cash drawer.	Sales
Order search	Search for and view completed orders.	Sales
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales

Task name	Task description	Functional area
Pick up tickets	Search for and complete orders requiring payment on arrival and/or printing.	Sales
Preregistered program check in	Mark who's attended a preregistered program.	Sales
Preregistered program roster	View the preregistered program roster.	Sales
Reconcile sales	At the end of your shift, count the final cash amount and reconcile sales.	Sales
Refund search	Search for and view refunds.	Sales
Refunds	Return items to refund money back to a patron or return free tickets to inventory.	Sales
Sales dashboard	View the sales web dashboard.	Sales

Treasury Data Entry

Users assigned the Data Entry role perform the daily data entry tasks at your organization. Users in this role can add and manage data about constituents, revenue, prospects, events, and volunteers. A Data Entry user can also manage mailings, create queries, and generate reports and KPIs to track and compare data.

Task name	Task description	Functional area
Add a deposit	Add a new deposit.	Treasury
Add a miscellaneous payment	Add a new miscellaneous payment.	Treasury
Add a payment	Add a new payment.	Revenue
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch search	Search for and view batches.	Revenue
Deposit search	Search for and view deposits.	Treasury
Fee	View the fee report.	Sales
Link multiple payments	Link multiple payments to a deposit.	Treasury

Task name	Task description	Functional area
Miscellaneous payment search	Search for and view miscellaneous payments.	Treasury
Miscellaneous payments	Create a report for miscellaneous payments.	Treasury
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Tax	View the tax report.	Sales
Transaction search	Search for and view revenue transaction records.	Revenue

Treasury Manager

Users assigned the Treasury Manager role perform and oversee treasury accounting tasks at your organization. Users in this role setup and manage banks and bank accounts. A Treasury Manager can add and manage deposits and payments and also view reports and queries about accounting data. In order to view a Miscellaneous Payment page, users must have rights to view Revenue pages.

Task name	Task description	Functional area
Add a deposit	Add a new deposit.	Treasury
Add a miscellaneous payment	Add a new miscellaneous payment.	Treasury
Add a payment	Add a new payment.	Revenue
Add an organization	Add a new organization constituent.	Constituents
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Bank search	Search for and view bank records.	Treasury
Batch entry	Manage batches through all stages of the batch workflow.	Revenue
Batch search	Search for and view batches.	Revenue
Business process ownership	View and edit business process owners.	Administration
Constituent search	Search for and view constituent records.	Constituents
Credit card processing	This task allows the user to process credit card transactions in a batch.	Revenue

Task name	Task description	Functional area
Deposit search	Search for and view deposits.	Treasury
Deposits	Create a deposit report.	Treasury
Fee	View the fee report.	Sales
Generate direct debit files	This task allows users to create transmission files for direct debits.	Revenue
Generate payments	This task allows the user to generate payments for recurring gifts and pledges.	Revenue
Generate prenotifications	This task allows users to create prenotification files for constituent accounts.	Revenue
Link multiple payments	Link multiple payments to a deposit.	Treasury
Manage bank accounts	Add, view and delete bank accounts.	Treasury
Miscellaneous payment search	Search for and view miscellaneous payments.	Treasury
Miscellaneous payments	Create a report for miscellaneous payments.	Treasury
Notifications	Provides a user interface for managing notifications.	Administration
Organization calendar	View events, mailings, and other activities taking place across your organization.	Sales
Query	Create and manage queries.	Analysis
Tax	View the tax report.	Sales
Transaction search	Search for and view revenue transaction records.	Revenue

Volunteer Manager

Users assigned the Volunteer Manager role oversee the volunteer program at your organization. Users in this role can add and manage data about volunteers, constituents, and jobs. A Volunteer Manager user can also print job schedules and generate reports to track volunteer activity.

Task name	Task description	Functional area
Add a group	Add a new group constituent.	Constituents

Task name	Task description	Functional area
Add a household	Add a new household constituent.	Constituents
Add a job	Add a new job.	Volunteers
Add a volunteer	Add a new volunteer.	Volunteers
Add an individual	Add a new individual constituent.	Constituents
Add an organization	Add a new organization constituent.	Constituents
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Altru training page	Altru training page.	Volunteers
Batch entry	Manage batches through all stages of the batch workflow.	Volunteers
Batch search	Search for and view batches.	Volunteers
Constituent density map	Displays an interactive map that displays constituent densities using a heat map overlay.	Marketing and Communications
Constituent map	Displays an interactive map where constituents can be viewed by their geographical locations.	Constituents
Constituent profile	View a detailed profile of a constituent.	Analysis
Constituent profile	View a detailed profile of a constituent.	Constituents
Constituent search	Search for and view constituent records.	Constituents
Household settings	Provides an interface for managing household settings.	Constituents
Interaction categories and subcategories	Provides an interface for managing interaction categories and interactions within the system.	Marketing and Communications
Job openings	View the list of job openings.	Volunteers
Job schedule	Show the job schedule report.	Analysis
Job schedules	Show the daily schedule report for all jobs.	Analysis
Job schedules	View the schedule of jobs across departments for a given date range.	Volunteers
Job search	Search for and view job records.	Volunteers
Notifications	Provides a user interface for managing notifications.	Administration

Task name	Task description	Functional area
Organization calendar	View events, mailings, and other activities taking place across your organization.	Administration
Organization search	Search for and view organization records.	Constituents
Query	Create and manage queries.	Analysis
Report explorer	Explore and run reports located on the Report Server.	Analysis
Screening plans	Create and edit volunteer screening plans.	Volunteers
Screenings and expirations	View screenings in progress and expiring traits.	Volunteers
Skill levels	Edit and rank volunteer skill levels.	Volunteers
Smart query browse	Browse smart query definitions.	Analysis
Smart query search	Search for a smart query and view the results.	Analysis
Volunteer awards	Create and edit awards that can be assigned to volunteers	Volunteers
Volunteer daily schedule	Show the daily schedule report for all volunteers.	Analysis
Volunteer daily schedule	View the schedule of jobs for a given day.	Volunteers
Volunteer performance summary	Show the volunteer performance summary.	Analysis
Volunteer performance summary	Show the volunteer performance summary.	Volunteers
Volunteer schedule	Show the volunteer schedule report.	Analysis
Volunteer schedule	Show the volunteer schedule report.	Volunteers
Volunteer search	Search for and view volunteer records.	Volunteers
Volunteer types	Create and edit volunteer types.	Volunteers
Web dashboard	View personalized dashboards	Analysis

Web Forms Administrator

Handles all aspects of web forms. Users in this group can design the appearance of web pages, configure a shopping cart, and create web forms for donations, programs, events, and memberships. They can also remove forms from the website and design acknowledgement messages to send after users check out.

Task name	Task description	Functional area
Acknowledgement email	Design a message to send users after they check out.	Web
All things Altru	Go to the Altru Resources page for videos, class schedules, and online help.	Tickets
Change password	Change your system password.	Administration
Email preferences	Edit the web page where website users can refuse email messages.	Web
Manage donation forms	Configure web forms to accept donations for designations.	Web
Manage membership forms	Configure web forms to sell membership programs.	Web
Manage program forms	Configure web forms to sell tickets for programs and events.	Web
Page designer	Edit the appearance and format of your web forms.	Web
Privacy policy	Edit the web page that displays your privacy policy.	Web
Undelivered email	Undelivered email jobs.	Administration
URL and browser settings	Enter URL information and web browser settings.	Web
Web payment settings	Edit the shopping cart for your web forms.	Web