New Features Guide

NewFeatures-2012

New Features for Blackbaud CRM 2.93

Before you upgrade and begin to use *Blackbaud CRM 2.93*, take a moment to review the following information that highlights new features and changes to existing features. It is important to share this information with *CRM* users in your organization.

Before You Upgrade

The new membership functionality requires Basic GL. It will not work with Legacy GL.

We recommend you commit any batches with membership transactions before you upgrade. If you have existing uncommitted batches with membership transactions, you can still commit those batches after the upgrade. However, if you need to edit details about the membership in the batch, you will need to remove that transaction from the existing uncommitted batch and re-enter it using the new Enter membership dues batch. For more information, see Enter Membership Dues on page 50.

The Membership Form part in *Blackbaud Internet Solutions* is considered deprecated with the 2.93 release and can no longer process web transactions. In version 2.93, you cannot create new Membership Form parts. Before you upgrade, we recommend that you delete any existing Membership Form parts since they will no longer process transactions.

Database Diagrams and Changes

With each release, we capture information about database changes since the previous version of the program. With the Blackbaud Infinity SDK, you can access this data about any new, modified, and removed tables, views, procedures, functions, fields, indexes, triggers, and parameters.

> *Note:* To install the Blackbaud Infinity SDK, go to the Downloads page on the Blackbaud website at www.blackbaud.com. For more information, see the *Blackbaud Infinity SDK Installation Guide*.

In the folder where you install the SDK, the \SDK\Documentation folder includes .chm files that describe the database schema. Open the BlackbaudEnterpriseCRM.chm file and click **View the list of changes** at the bottom of the main Database Reference page.

We also generate entity relationship diagrams (ERDs) for the database as PDF files. To access these diagrams, open the BlackbaudEnterpriseCRM.chm file, select a table, and click **Entity-Relationship diagram** at the bottom of the page.

The Documentation folder also includes previous versions of the BlackbaudEnterpriseCRM.chm file. You can view previous *.chm files for version-to-version changes.

New Code Tables and Configuration Tasks

To enable some features in the program, you must complete configuration tasks. These tasks appear under **Configuration** on pages throughout the program. In addition, some system-wide configuration tasks and features appear in *Administration*. If a new feature includes a code table, you may want to determine the values to use with the code table. This release includes the new configuration tasks and code tables below.

Note: We recommend that you review the entire new feature documentation to determine how new features affect your organization.

New Code Tables

This section provides a list of new code tables added for this release. To help you locate each new table, we provide the area of the application where table entries can be added.

• Decline Recognition Programs on page 23

New Configuration Tasks

This section provides a list of new configuration tasks added for this release. To help you locate each new task, we provide the area of the application where each task is located.

• Login Enhancements on page 3
• Import File Locations on page 37

Enhanced Configuration Tasks

This section provides a list of configuration tasks and other feature configuration settings that have been enhanced for this release. We recommend that you review the changes and evaluate how they affect your organization. The changes may require updates to your configuration.To help you locate each enhanced task, we provide the area of the application where each is located.

• Constituent Matching Settings on page 14
• Batch Template Duplicate Settings on page 20

Security

Existing application users and system roles upgrade unchanged to version 2.93; however, with each version, you should review the new features and any security-related information to determine if you need to make changes or additions to your existing security setup.

Note: For more information about security features and changes, see the *Security Guide*.

Login Enhancements

When you host your Blackbaud application, you can now edit the web.config file to turn on forms authentication to improve the log in and log out experience for your users. Forms authentication includes the following new features.

Note: If Blackbaud hosts your application and you want to turn on forms authentication, create a case on Case Central.

• A login screen that displays the Blackbaud application name.

- Invalid login messages to help clarify how to successfully log in to the application. For example, a message may appear to inform you the user name and password is unknown or that a field is incomplete.

- The ability to log out of the application. To do this, click the user name at the top of the page. From the menu that appears, click **Log out**.

- Automatic log out due to inactivity after 15 minutes. To adjust the default time, you can edit the `BrowserUserInactivityTimeoutInSeconds` and `BrowserUserInactivityTimeoutInSeconds_SystemAdmin` keys in the `<AppSettings>` section in the web.config file.

Also when you turn on forms authentication, you can provide a way for users to reset passwords. For information about self-service password reset, see the Self-service Password Reset on page 16.

For more information about forms authentication, see the *Infinity Platform Installer and Upgrade Guide*.

Web-Based User Experience

With the 2.93 release, you can now access the program through a web browser rather than through Microsoft *Windows* as in past releases. This web-based user experience offers more flexibility in how you access the program, and provides new features and functionality, as well as enhancements to existing functionality. Before you start to work in the latest version, we recommend you familiarize yourself with these changes.

Note: We redesigned the program's Start page. The **Blackbaud CRM** button launches the new web-based version of the program in your browser. To access the click-once version, click the **Smart Client** button.

Web-based User Experience Differences

Note: Currently, in the web-based version of the program, there are a few differences from the click-once version. To use any of the features listed here, log out of the program in your browser. Then on the Start page for the program, click **Smart Client** to log into the click-once version of the program.

- Communications processes will auto-merge *.docx files only, not *.doc; however, you can still download the output and merge the files outside of the program. Auto-merge works as it did before in the click-once version of the program.

- In the web-based version, the **Write a letter** task for a constituent does not allow you to open the letter directly in *Word*. After you save the **Write a letter** task, you are on the Interactions page for the constituent. The letter is saved on the Documentation tab as an attachment. You can select the letter and click **Open file**. Also, on the Write a letter screen, you must select an existing letter template; you cannot create a new one from the screen. The Write a letter task works as it did before in the click-once version of the program.

- Page designer is not currently supported in the web-based version. Changes made using page designer are rendered in the web-based version. Shell design in *Administration* is partially supported in the web-based version. You can access the Shell design page and have access to some, but not all, of the tasks and actions. For example, you cannot use Shell design to set properties for things like functional areas, tasks, and pages. These features continue to work as they did before in the click-once version.

- In the web-based version, you can open and view items in the Catalog Browser. However, in order to load catalog items, you must use the click-once version.

- The Report model generator is not currently supported in the web-based version. Reports created with the Report model generator in the click-once version are not available in Report explorer in the web-based version.

- Postal templates cannot currently be created in the web-based version. Existing or new ones created in the click-once version can be used, but not edited.

- On the Preview results tab of a query, there is no browse results using a page definition capability in the web-based version. If you run the query, on the query page you can click **Browse** and select a page definition. Or from the main Query page, you can select a query, click **Browse**, and select a page definition.

- In the web-based version, OLAP explorer and OLAP Excel reports are not supported. These features continue to work as they did before in the click-once version.

- From a query definition in the click-once version, you can click **Create report**. In the web-based version, this functionality is available on the main Query page. Select a query and click **Create**, **Report**.

- Favorites from the click-once version are not supported in the web-based version. However, you can use your browser's favorites, shortcuts, or bookmark functionality. When you open the browser and click the browser favorite, you will be prompted to log in if you are not currently logged into the program.

- Auction Maestro Pro is not supported in the web-based version.

- Several batches types are not supported in the web-based version including: BBIS transaction, Basic revenue, and Revenue update batches. Auction Maestro Pro batches are also not supported in the web-based version.

- In the web-based version, the ability to export from an open batch or to freeze columns within a batch is not supported.

- Many of the shortcut keys for batch data entry have changed. **Ctrl + M** now calls up shortcut keys specific to the tasks available in an open batch. For detailed information, see Batch Entry Toolbar on page 17.

Note: The new Enter membership dues batch is not supported in the click-once version of the program. It is supported in the web-based version only.

Web Browser Considerations

The ability to access the program through a web browser offers more flexibility in how you access the program. Web browser settings and options, such as toolbar views and shortcut keys, can vary from browser to browser. To maximize the web-based user experience, we recommend you familiarize yourself with your web browser's settings.

❑ Consider the number of toolbars you actively display in your browser. Numerous toolbars can decrease the area on your screen, which can require the need to scroll more. You can easily remove or hide toolbars as necessary.

❑ Review your browser's shortcut keys. For example, you can use shortcut keys in your browser to navigate web pages or open Help. Because there are shortcut keys for data entry within the program, you need to be aware of any conflicts.

❑ Adjust the magnification, or "zoom", level for your browser as necessary. For example, larger zoom levels decease the area in which the program appears and can require you to scroll.

❑ To have the help file open as a new tab within the browser or as a new browser window that you can refer to as you, configure the browser setting that determines whether new windows open as new tabs.

❑ For optimal performance, access the program through a supported browser. For a complete list of supported browsers, see Supported Web Browsers on page 12.

General Feature Enhancements

Throughout the web-based user experience, you can now use enhancements to general features such as basic navigation, searches, and data lists.

Explorer Bar

On the explorer bar, you can now quickly access recently viewed information. Under **Recent searches**, you can access recently performed searches, complete with the criteria most recently used. Under **Recently accessed**, you can access recently view pages and records.

Several tasks that previously appeared on the explorer bar now appear elsewhere or not at all.

• The **Refresh** task that previously appeared on the explorer bar no longer appears in the web-based user experience. To refresh a page, simply refresh your browser.

• The **Help** task that previously appeared on the explorer bar now appears in the upper right-hand corner of your screen, next to **View calendar**. From the **Help** menu, you can now access the help.

• Tasks that previously appeared on the explorer bar of a functional area's page, such as **Configuration** and **Reports**, now appear on the page itself.

In the *Windows*-based user experience, the explorer bar remained static when you scrolled through a page and displayed its own scroll bar as necessary. In the web-based user experience, your browser's scroll bars now control both the page and the explorer bar at the same time.

In the web-based user experience, you can quickly expand or collapse the explorer bar as necessary. To expand or collapse the explorer bar, click **Show the action menu** or **Hide the action menu**, which appears as an arrow between the page and the explorer bar.

Search

To access or select an item from search results in the *Windows*-based user experience, you selected the item and clicked **Select**. In the web-based user experience, search results now provide links to items directly from an item's row. For example, to select a constituent or open a constituent's record from a search, click the constituent's row in the results.

On the explorer bar, you can now access recently performed searches under **Recent searches**. When you access a recent search, it retains the criteria from the most recent search so you can quickly resume a previous search or adjust criteria as necessary.

Data Lists

In the web-based user experience, data lists now provide several enhancements and differences from the *Windows*-based user experience.
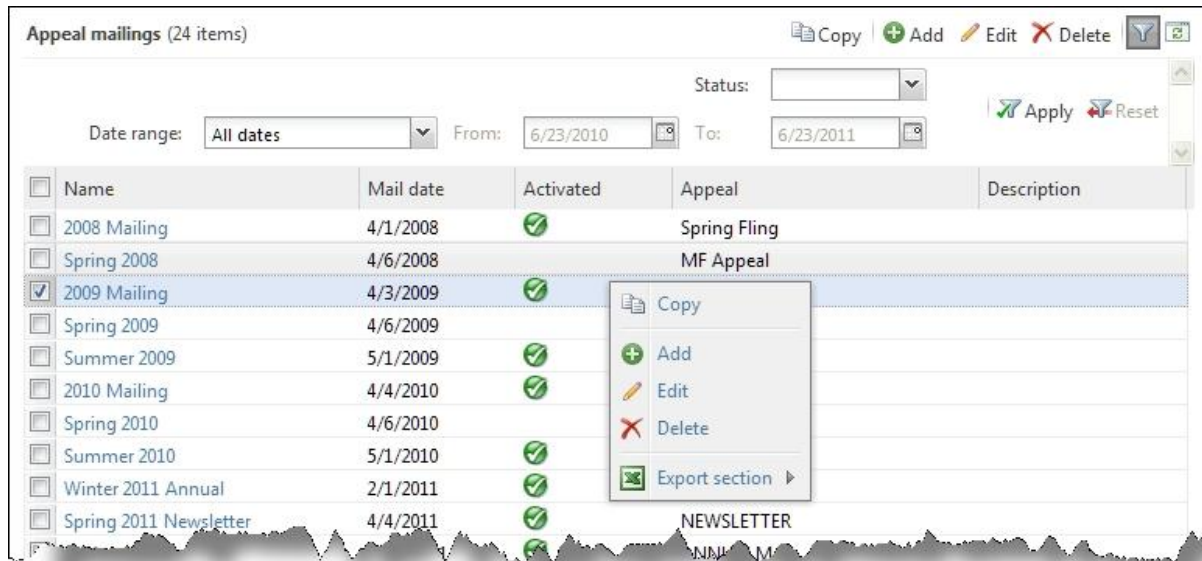
Easy access to records

To access an item's record from a data list in the *Windows*-based user experience, you selected the item and clicked **Go to**. In the web-based user experience, the **Go to** action no longer appears. Data lists now include links to records directly from an item's row. For example, to access a mailing's record from a data list, click its name. Some data lists include links to multiple record types, such as to both a revenue record and the constituent associated with the transaction.

Right-click menu

From a data list in the web-based user experience, you can access the same actions as the action bar through a right-click menu. From the right-click menu, you can also click **Export section** to download the data list to a comma-separated values (*.csv) file or Microsoft *Excel* (*.xlsx) spreadsheet.

Selection of multiple rows

With some data lists, you can now select and act upon multiple items at one time. These data lists include a column of checkboxes, from which you can select multiple items. From the header of the data list, you can easily select or deselect all checkboxes within the column.

Details view

From a data list in the *Windows*-based user experience, you could view additional information about an item from a **Details** window below the data list. In the web-based user experience, a details view now appears directly beneath a selected row for the quick reference of additional information.

New Navigation

The web-based user experience offers new ways to access information within *CRM*. For example, header icons that used to appear as top-level page navigation now appear as tabs with easily accessible fly-out menus.

This top-level navigation also provides quick access to other common tasks and options.
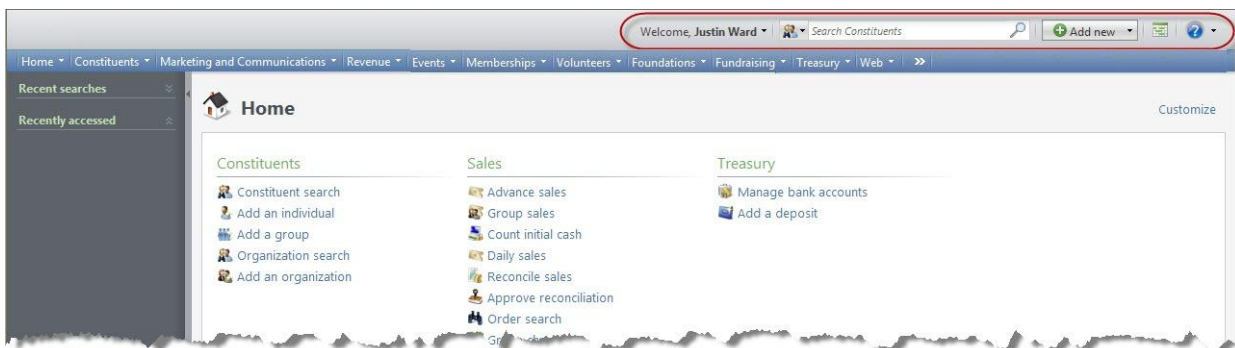
Welcome menu

From the user name, you can access a menu to change your password, unlock optional modules, or run the program as another user. In the *Windows*-based user experience, you access these tasks through the **Tools** menu.

Pervasive search

You can quickly search all features, such as to find specific tasks or functionality. You can also adjust the search to return only specific types of records, such as to quickly find a constituent or deposit.

Add new

To quickly add a new constituent or revenue record from anywhere in the program, click **Add new** and select the type of record to add, such as **Individual** or **Payment**.

View calendar

To quickly access the organization calendar, such as to plan an event or communication, click **View calendar**.

Help menu

To quickly access the help file or view information about your version of the program, select **About** from the **Help** menu.

New Features for the Web-Based User Experience

The web-based user experience offers new features, and enhancements to existing functionality, within the program.

Key Performance Indicators (KPIs)

Key performance indicators (KPIs) track your organization's strategic performance to help determine a course of action. The web-based user experience offers new enhancements that make setup easier and KPI information easier to interpret. Your existing KPIs still work correctly.

KPI Terminology Changes

"Yellow Until" and "Red until" terminology has been replaced with "Good Target" and "Satisfactory Target."

Actual numbers below the Satisfactory Target are considered "Poor Performance."

Actual numbers between the Satisfactory Target and the Good Target are considered "Satisfactory Performance."

Actual numbers above the "Good Target" are considered "Good Performance."

KPI Changes

Adding a KPI is essentially the same as it was with in the *Windows*-based user experience, except for the Goal tab. With the new web-based user experience, "sliders" on Goal tab graph have been removed, terminology has changed, and good target and satisfactory target numbers can be entered directly or as a percentage of the overall goal.

KPI dashboards no longer appear in the web-based user experience. On the KPIs page, you can view "dashboard" information, including the KPI value chart, when you select a KPI instance listed in the grid. You can view and edit this KPI information from an open KPI instance as well.

You can now hover your mouse over the bullet graphs to display helpful tooltips for each element within the graph.
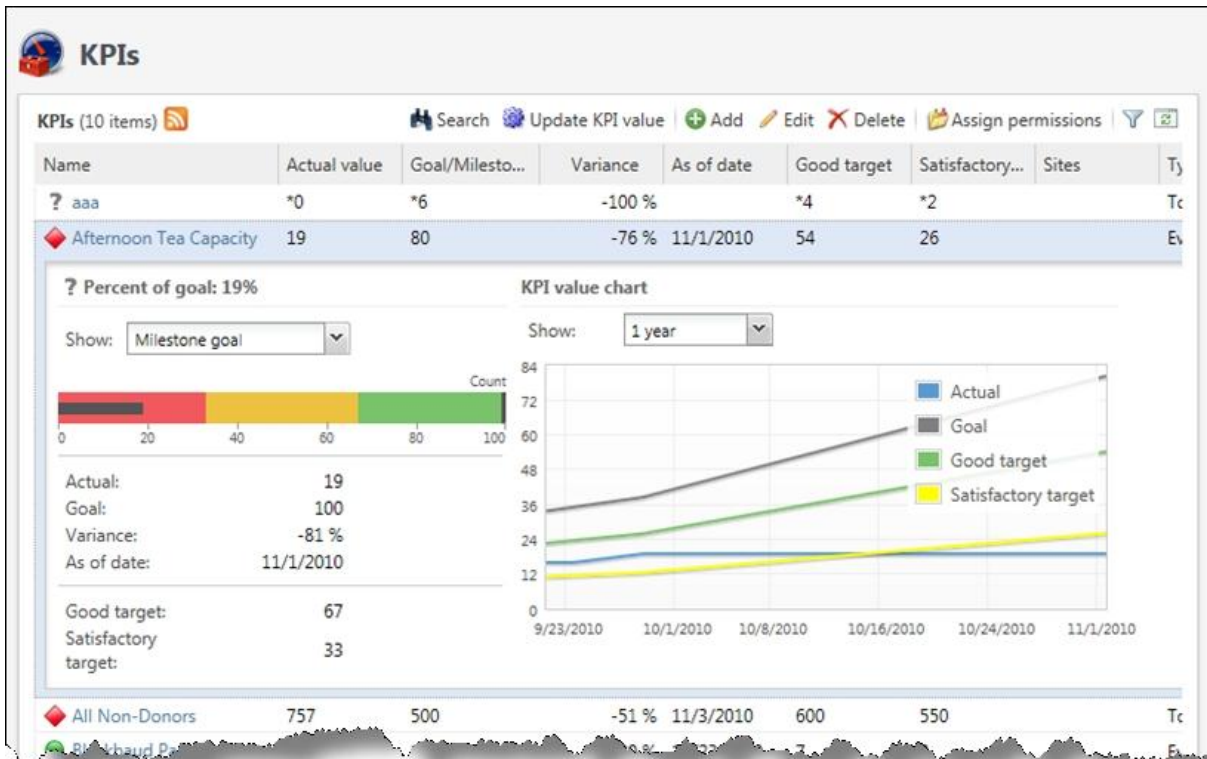
On the Goal Status tab of the record of a KPI, you can now quickly gauge the actual performance toward a goal and whether the value indicates poor, satisfactory, or good performance.

Query

The web-based user experience offers new features, and enhancements to existing functionality, within *Query*. These changes include a new Favorites folder, and the ability to merge two ad-hoc queries into one. For more information, see Query and the Web-Based User Experience on page 54.

Batch

The web-based user experience offers new features, and enhancements to existing functionality, within *Batch*. These changes include new ways to enter information into a batch. For more information, see Batch and the Web-Based User Experience on page 17.

Marketing and Communications

With the new web-based user experience, you must convert all existing letters in the Letter Template Library and Letters page from a .doc file extension to a .docx file extension. This allows your documents to be compatible with printing and merging in the program. For more information, see Convert Letters in the Letter Template Library and Letters Page on page 21.

Supported Web Browsers

The ability to access **CRM** through a web browser offers more flexibility in how you access the program. For example, you can now access the program from your non-*Windows* operating systems and mobile devices. The program supports these web browsers.

A-Grade Browsers

For an optimal experience, we strongly recommend that you use one of the following browsers, which have been fully tested and support 100% of the new web-based functionality.

- Microsoft *Internet Explorer 9*. 32-bit (Windows Vista/Windows 7)
- Microsoft *Internet Explorer 8*. 32-bit (Windows XP/Windows Vista/Windows 7)
- Mozilla *Firefox 4 and higher*. (Windows XP/Windows Vista/Windows 7/Mac OS 10.6 and higher)
- Google *Chrome*. (Windows XP/Windows Vista/Windows 7/Mac OS 10.6 and higher)
- Apple *Safari 5*. (Mac OS 10.6 and higher)

C-Grade Browsers

If necessary, you can use one of the following browsers, but these browsers may not provide the same results as A-Grade browsers.

- Microsoft *Internet Explorer 9*. 64-bit (Windows Vista/Windows 7)
- Microsoft *Internet Explorer 8*. 64-bit (Windows Vista/Windows 7)
- Microsoft *Internet Explorer 7*. (Windows XP/Windows Vista)
- Mozilla *Firefox 3.6+*. (Windows XP/Windows Vista/Windows 7/Mac OS 10.6)
- Apple *Safari for iOS 4 and 5*. (iPhone/iPod Touch/iPad)
- *Opera 11*. (Windows XP/Windows Vista/Windows 7/Mac OS 10.6)
- Google *Android* (Android)

Administration

The following *Administration* enhancements are available in **CRM 2.93**. For more information about these features, see the *Administration Guide*.

AddressFinder Enhancements

From *Administration*, you can use an *AddressFinder* data tune-up process to ensure constituent address information remains current. To help ensure correct updated address information, the process no longer submits addresses that do not meet the United States Postal Service (USPS) National Change of Address (NCOA) guidelines. Addresses that do not meet the required format, such as street addresses with more than two lines or greater than 50 characters, and addresses with cities longer than 28 characters, now appear as exceptions during the submit process. After you run the submit process, you can download any exceptions as a comma-separated values (*.csv) file or spreadsheet (*.xlsx) for analysis.

When you edit the options for an *AddressFinder* process, you can now select the Do Not Mail reason code to display for addresses that return as undeliverable with the National Change of Address (NCOA) footnote code for a failed mail grade. If you select to update all addresses and an address returns this footnote code, the program automatically marks the address as Do Not Mail when you commit the *AddressFinder* batch. To mark an address as Do Not Mail, the program selects **Do not send mail to this address** for the address and displays the selected reason code.

Constituent Matching Settings

When you add a constituent record through batch, import, or the Add an individual or Add an organization screens, the program applies an algorithm to calculate how similar the record is to existing records in the database. We call this calculation the "match confidence score." A record with a high match confidence score probably matches an existing record, while a record with a low score probably does not. With this release, we enhanced the existing algorithm to make duplicate identification quicker and more accurate. For information about how the algorithm calculates the match confidence score, see the *Administration Guide*.
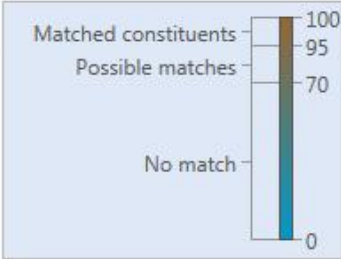
In previous releases, you used the **Duplicate record check settings** task on the Duplicates page in *Constituents* to define a match confidence limit for potential duplicates. Any constituent with a match confidence score above the defined limit was considered a duplicate, and any constituent with a score below the limit was added to the database. We now call these confidence options **Constituent matching settings** and moved them to *Administration* under **Data**.

With the new **Constituent matching settings** task, you define three percentage ranges or "thresholds" for match confidences that determine when incoming records are matches, possible matches, or not matches based on their match scores. The program performs different actions for each threshold:

- Matched constituents — The program automatically assigns the record ID from the existing constituent to the matched incoming constituent. This process occurs behind the scenes and requires no actions from users. **Note:**For constituent update batches, the program updates the existing constituent's name and adds the address, phone, and email as primary. For enhanced revenue, revenue, and revenue update batches, the program adds the revenue to the existing constituent.

- Possible matches — The program prompts users to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent. For more information about how to compare records on the duplicate resolution screen, see Resolve Duplicate Constituents on page 29.

- No match — The program automatically creates a new constituent. For revenue, enhanced revenue, or revenue update batches, the program creates a new constituent and adds the revenue to that record. This process occurs behind the scenes and requires no actions from users.

You apply two sets of thresholds: one for records added by batch or import and another for records added manually. By default, thresholds for batch and import are set at 100-95%, 94-70%, and 69-0%. The defaults for records added manually or through constituent batches and set at 100-70% and 69 to 0%. If necessary, an administrator can adjust these settings for your organization by clicking **Edit** on the Constituent Matching Settings page.

Note: The matching algorithm provides optimal results when you use the default threshold percentages. There are several factors to consider before editing these. For more information, see the *Administration Guide*.

In the **Matched confidence** column, edit the percentage ranges. You can clear **Matched constituents** or **Possible Matches** to turn off the automatic record update and manual review options.

The first group of settings applies to batch templates for constituent update, enhanced revenue, revenue, revenue update, and sponsorship. They also apply to import processes that use these types of batch templates. To provide additional flexibility, you can set different match settings on individual batches and imports. For example, if data imported from a particular vendor requires extra scrutiny, you can update match settings on the Matching options tab for imports and under **Specify matching options** on batch templates. (**Note**: You cannot edit matching settings on constituent and sponsor batch templates or imports —they always use the defaults from *Administration*.) For more information about the new matching settings on batches and imports, see Batch Template Duplicate Settings on page 20 and Matching Options Tab on page 36.

The second group of settings applies to constituent batches and when you manually add constituent records (individual, organization, vendor, or vendor contact) on the Add screens in *Constituents*.

Self-service Password Reset

When you host your own Blackbaud application and turn on forms authentication in the web.config file, the **Self-service password reset** task now appears under **Configuration**. Configure this task to provide a way for users to change passwords.

Note: Forms authentication is a new feature that includes other login enhancements such as invalid login messages to help clarify how to successfully log in to the application. For more information about forms authentication, see Login Enhancements on page 3 and the *Infinity Platform Installer and Upgrade Guide*. If

Blackbaud hosts your application and you want to turn on forms authentication, create a case on Case Central.

An **Enable self-service password reset** checkbox appears on the new Edit self-service password reset options screen for you to select so users can change passwords. When you do this, an Update your email address screen appears the next time a user logs in to your application.

When a user clicks **Forgot your user name or password** on the login screen, an email sends to the user's email address that includes the user name and a link to reset the password. When the user clicks the link, a screen appears to enter a new password and confirm it. By default, the link expires after the user clicks it or after 24 hours.

Tip: To change the email address for the user, select the user name at the top of the page. From the menu that appears, click **Update email address**. You cannot associate an email address with more than one user.

Batch

The following *Batch* enhancements are available in *CRM 2.93*. For more information these features, see the *Batch and Import Guide*.

Batch and the Web-Based User Experience

The web-based user experience offers new features, and changes to existing functionality, within *Batch*. We recommend you review these changes before working in *Batch*.

- To access a batch, simply double-click the batch in the grid, right-click and select **Edit**, or highlight and click **Edit** on the toolbar.

- If there is an exception chain, you now click the batch number which displays as a hyperlink.

- To view the batch commit parameters and status of your committed batches, you now select the **Committed** hyperlink in the **Status** column on the Committed Batches tab.

- The **Details** pane no longer appears at the bottom of the Batch Entry page when you select a batch. Now, the detail information expands directly underneath the batch you select.

- When working within a batch, cells with errors now display red "ticks" within the cell, so that you can easily identify them.

- A minimized batch data entry screen appears as a link at the bottom right of your browser. To maximize the screen, click the link.

Batch Entry Toolbar

As you enter information into a batch, you can use the toolbar ribbon to quickly find the commands that you need to complete a task. The tasks on the toolbar ribbon are unique to each batch type, and are grouped together under tabs. Each tab on the toolbar ribbon relates to a type of activity, such as **Processes**, **Configuration**, or **Messages**.
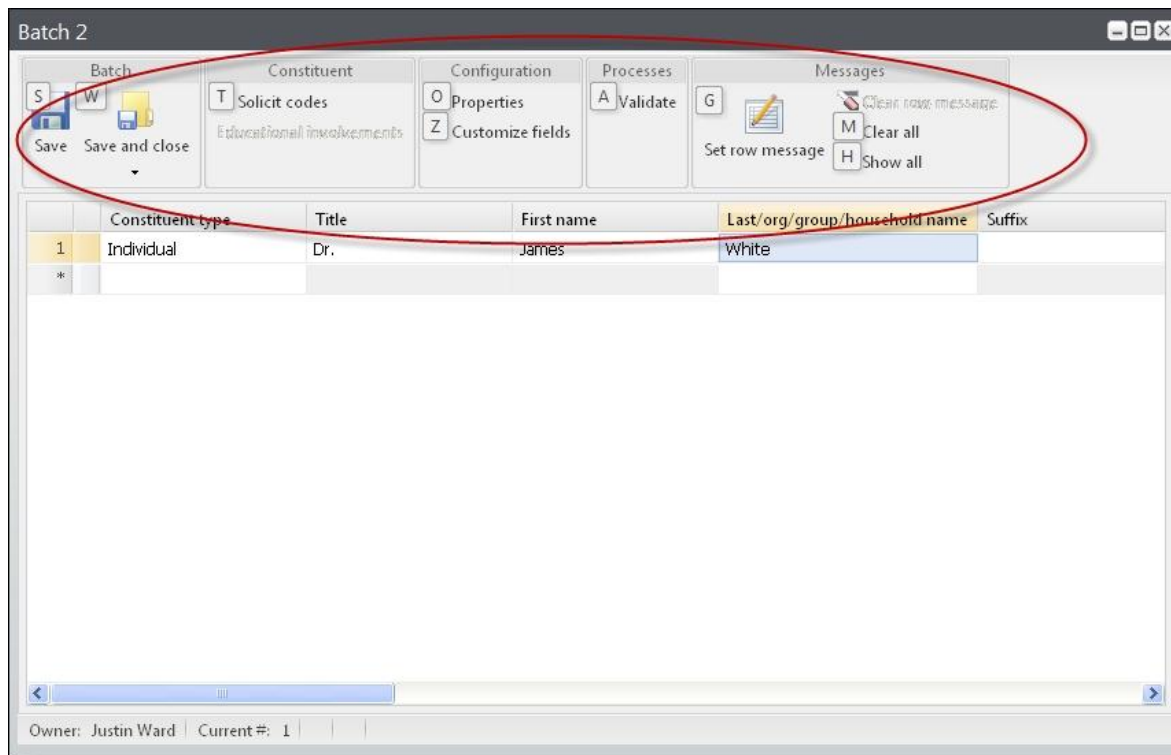
To quickly perform tasks on toolbar ribbon using your keyboard, select the **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view.

Note: If shortcut keys do not display, check your web browser's pop-up blocker settings.

To access a task on the toolbar ribbon, select the corresponding letter. To exit the shortcut key display mode, you can select **Esc**, or simply click your mouse.

AMPro Import Batch

You can now view control reports and exception reports for the AuctionMaestro Pro Import Batch.

Enhanced Revenue Batch

From an Enhanced Revenue Batch, you now have an option to apply a payment by percent or amount. For example, when you access the Apply to commitments screen from the Revenue tab of the Enhanced Revenue Batch, you can now select "Amount" or "Percent" in the **Apply by** field. Once you make your selection, you can edit the amount or percent in the corresponding grid column.

You can also split designations by percent or amount. For example, when you access the Split designations screen from the Revenue tab of the Enhanced Revenue Batch, you can select **Split by percent** or **Split by amount**.

Batch Pagination

To help improve performance and navigation for large batches, the grid on the Batch data entry screen now allows up to 50 rows. If a batch contains more than 50 entries, it now automatically creates additional pages to accommodate the entries. On the Batch data entry screen, you can navigate through the multiple pages as necessary to manage the batch entries.

Batch Template Duplicate Settings

New **Specify matching options** are enabled on the Add a batch template screen when you select **Check for duplicate constituents** under **Specify commit options** for the following batch template types: constituent update, enhanced revenue, revenue, and revenue update. The matching settings default from the Constituent Matching Settings page in *Administration*. If you need different settings for a particular batch template, you can adjust them on this screen. For example, if you have a custom template for a vendor whose data requires extra scrutiny, you can narrow the **Matched records** and **Possible matches** thresholds so that more manual review is required. The matching settings for a batch template apply to all imports that use that template.
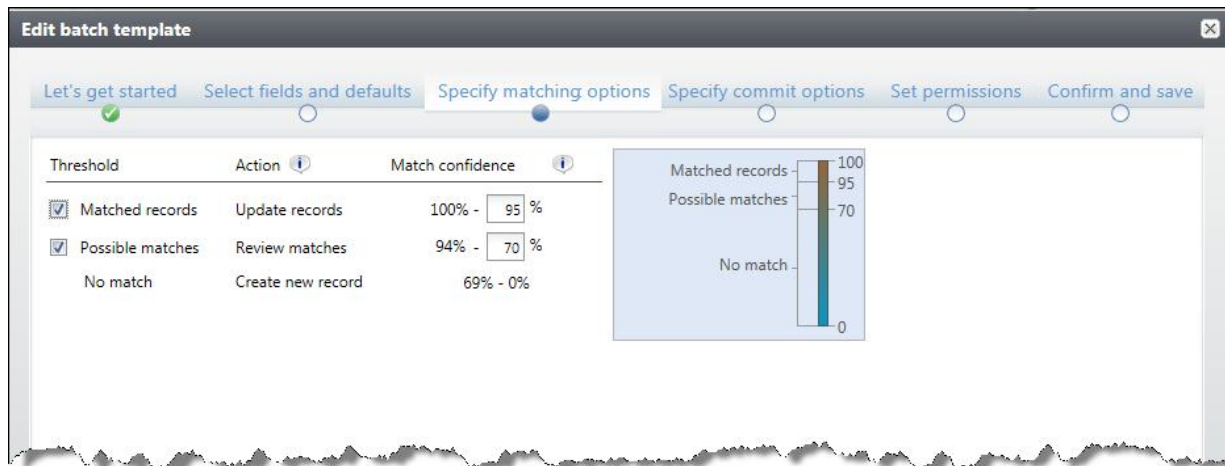
For more information about matching settings, see Constituent Matching Settings on page 14.

Resolve Batch Exceptions

Several enhancements to the batch screen now make it easier to resolve data errors.

- For batch rows that contain multiple errors, you can now expand the row to view a complete list.

- A red triangle appears in the topright corner of each field with an error. When you place your cursor over the triangle, the full error message appears.

- You can now save a batch that contains incomplete or incorrect rows. This allows you to save a batch even if it has errors so that you can finish at a later time.

- A **Dismiss** option may appear for imported batches if errors are detected for unrequired fields. For example, this option appears if an unrequired fields contains as an invalid date format or a country not included in the **Countries and states** code table. You must resolve these errors before you can commit the row. You can correct the value in the field or select **Dismiss** to leave the field blank.

- For constituent update and enhanced revenue batches, when you click the yellow caution symbol for duplicate record errors, the link takes you to the new duplicate resolution screen. For information about this screen, see Resolve Duplicate Constituents on page 29.

Unprocessed Credit Card Transactions in Batch

During the batch commit process, when you select to create an exception batch for a membership dues batch, revenue batch, or an enhanced revenue batch, any unprocessed credit card transactions are now added to the exception batch. After you ensure that each credit card transaction is correct, you must run a credit card processing process for the exception batch. You can then commit the exception batch to automatically create or update the records in the database.

For more information about processing credit cards from the Credit card processing page in *Revenue*, see the *Revenue Guide*.

Communications

The following *Communications* enhancements are available in **CRM 2.93**. For more information about these features, see the *Communications Guide*.

Convert Letters in the Letter Template Library and Letters Page

With the new web-based user experience, you must convert all existing letters in the Letter Template Library and Letters page, such as membership renewal letters, from a .doc file extension to a .docx file extension. This allows your letters to be compatible with printing and merging in the program.

Note: If you use Microsoft *Word 2003* or older, you must install the Microsoft Office Compatibility Pack to open files with a .docx extension. You can download the Microsoft Office Compatibility Pack at http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=3.

▶ **Convert letters from .doc to .docx**

This procedure explains how to convert letters in the Letter Template Library, however, this procedure must also be performed on all letters on the Letters page in *Marketing and Communications*.

1. From *Marketing and Communications*, click **Letter template library** under **Configuration**. The Letter Template Library page appears.

2. Under **Letter template**, select the letter for which to convert, and click **Edit**. The Edit a letter template screen appears.

3. In the **Letter** field, click the link to the file for which to convert. The File Download screen appears.

4. Click **Open**. The file opens in Microsoft *Word*.

5. For Microsoft *Word 2007* or *2010*, click the Office Button, and select **Save As**. The Save As screen appears.

   For Microsoft *Word 2003* or earlier, click **File**, and select **Save As**. The Save As screen appears.

6. In the **Save as type** field, select **Word Document (*.docx)**.

7. For Microsoft *Word 2007* or *2010*, click **Maintain compatibility with Word 97-2003** if the checkbox is not already selected.

Warning: This checkbox must be selected so the letter can be opened with versions earlier than Microsoft *Word 2007*.

8. Click **Save**.

9. In the program, on the Letter Template Library page, select the letter for which you just converted and click **Edit**. The Edit a letter template screen appears.

10. Click **Choose file**. The Choose File to Upload screen appears.

11. Browse to the location where you just saved the converted letter, and click **Open**. You return to the Edit a letter template screen and the converted file appears in the **Letter** field.

12. Click **Save**. You return to the Letter Template Library page, and the letter now contains the converted file.

Constituents

The following *Constituents* enhancements are available in *CRM 2.93*. For more information about these features, see the *Constituents Guide*.

Constituent Education

From the Education tab of a constituent record, you can add an education history. Previously, you can add education histories and not mark any as primary. Now, when you add the first education history record for the constituent, it will be marked as primary automatically. Existing constituents with one or more education histories will remain unchanged—if none of the education histories were marked as primary before the upgrade, none will be marked primary after the upgrade.

Decline Recognition Programs

Constituents may decline to be included in recognition programs and levels, even before they qualify. From the Recognition Programs tab, you can specify any programs and levels that the constituent declines. The Constituent recognition process will not include constituents who have declined recognition levels. When a constituent declines a recognition level, you can specify a reason. These reasons are based on the Recognition Declined Level Reason code table.

Constituent Merge

We made several enhancements to the constituent merge process.

Constituent Merge: Tasks

The constituent merge process now includes the following merge tasks:

• The **Blackbaud internet solutions** merge task merges online records for two constituents.

• The **Event restrictions** merge task merges event restrictions for two constituents.

• The **Modeling and propensity custom ratings** merge task merges modeling and propensity attributes.

• The **Net community** merge task merges the online login information associated with two constituents.

• The **Vendor merge** task merges the vendor records for two constituents.

To include these tasks when you run the constituent merge process, select them when you add or edit a constituent merge configuration.

From *Constituents*, click **Duplicates**, and on the Duplicates page, click **Constituent merge**. On the Constituent Merge page, select the Merge Configurations tab and click **Add** or select a merge configuration and click **Edit**. Under **Merge tasks**, select the merge tasks to include in your constituent merge process.

Constituent Merge: Personal Information

When you merge two constituents and use the Personal information merge task, you select whether to preserve the source's name field, the target's name field, or the most complete of the two. For example, if you select "Source's Name," the merge task preserves the values of all of the source's name fields on the target record.

Now you can select an option to keep the names from one record if the name fields on the other record are blank. For example, if you select "Target's name" in the **Name to keep** field, the merge keeps the target's first and last name and inherits the source's middle name, as shown below.

Values before merge:

Source: First name = "John" Middle name = "David" Last name = "Smith"

Target: First name = "James" Middle name = [blank] Last name = "Smith"

Values after merge:

Target: First name = "James" Middle name = "David" Last name = "Smith"

The new option applies to these name fields:

First name	Maiden name
Last name	Nickname
Organization name	Title code
Group name	Title code 2
Organization name prefix	Suffix code
Middle name	Suffix code 2

Within the Personal information merge task, you also select whether to merge deceased information if only the source record is marked as deceased. Deceased information includes the deceased date, confirmation of the deceased status, and the source, such as an obituary. If you select **Do not merge deceased information if only source record is marked as deceased**, the merge process does not add deceased information from the source record to the target unless the target is marked as deceased. If you do not select this option and only the source record is marked as deceased, the process marks the target as deceased and adds any deceased information from the source to the Personal tab of the target.

If both the target and source records are marked as deceased, the process adds deceased information from the source record to any blank deceased fields on the target record. If deceased information already exists on the target record, the target's deceased fields remain unchanged.

Constituent Merge: Links to Application Users

If the source constituent has a link to an application user, but the target does not, the link is added to the target during the merge.

Constituent Merge: Inactive Records

When you use a business process to merge, you can no longer merge records into inactive records that were previously a source record in a merge.

Constituent Merge: Revenue

If an uncommitted revenue batch includes a constituent that is merged, the merge process replaces any reference to the source constituent in the batch with the target constituent. The constituent is also updated for any associated recognition credits, matching gifts, and solicitors in the batch. Also, for any constituents records created from the revenue batch that link to an existing constituent (on the Household or Business tabs), if the existing constituent is merged before the batch is committed, the link is updated so it points to the target record.

Constituent Merge: Addresses

If you select the **Exclude duplicate addresses** option for the Addresses and Email addresses merge tasks, the program now transfers the matching address from the source to the target (to prevent duplicates). If the source also **has Do not send mail to this address** (plus a reason code) or **This address is confidential** selected, those settings transfer now as well. For example:

Values before merge:

Source: Address 1 with **Do not send mail to this address** (with a reason code 1) and **This address is confidential**

Target: Address 1 with no other options selected

Values after merge:

Target: Address 1 with **Do not send mail to this address** (with a reason code 1) and **This address is confidential**

Note: The program excludes duplicates automatically for the Phone numbers merge task (you do not have to select an option). With this release, the merge now copies over **the Do not call this number** (plus reason code) and **This phone number is confidential** settings to the target address.

Constituent Merge: Solicit Code

If the source and target constituent have the same solicit code with overlapping dates, the merge process assigns the widest possible date range to the target. Here are examples of possible scenarios:

Scenario 1: If the date ranges overlap, the process uses the widest range between the two.
Values before merge:

Source: Code A: 01/01/2001 to 01/01/2002

Target: Code A: 06/01/2001 to 01/01/2003
Value after merge:

Target Code A: 01/01/2001 to 01/01/2003

Scenario 2: If the dates overlap but one of the start dates is blank, the process uses the existing start date and the later end date.
Values before merge:

Source: Code B: [blank] to 01/01/2002

Target: Code B: 06/01/2001 to 01/01/2003
Value after merge:

Target: Code B: 06/01/2001 to 01/01/2003

Scenario 3: If the dates overlap but one or more of the end dates is blank, the process uses the earliest start date and the blank end date.
Values before merge:

Source: Code C: 01/01/2001 to 01/01/2002

Target: Code C: 06/01/2001 to [blank]
Value after merge:

Target: Code C: 01/01/2001 to [blank]

Scenario 4: If the dates overlap and the start or end dates are blank on the source and target, the merge leaves the missing values blank and creates the widest possible range based on the dates available.

Values before merge:

Source: Code D: [blank] to 01/01/2002

Target: Code D: [blank] to 01/01/2003
Value after merge:

Target: Code D: [blank] to 01/01/2003

Note: If the source contains a value in the **Comments** field and the target **Comments** field is blank, the source comment is merged to the target.

Constituent Merge: Groups and Households

If a target and source constituent have the same group or household membership with overlapping dates, the merge process assigns the widest possible date range to the target.

Scenario 1: If the source and target are both assigned to a household, the source's household will not be merged because a constituent cannot be a member of more than one household.

Scenario 2: If the source and target are in the same household or group with overlapping membership dates, the merge process will assign the widest possible date range to the target.
Values before merge:

Source: Membership group/household A: 01/01/2001 to 01/01/2002

Target: Membership group/household A: 06/01/2001 to 01/01/2003
Value after merge:

Target: Membership group/household A: 01/01/2001 to 01/01/2003

Scenario 3: If the source and target are in the same household or group but the membership dates do not overlap, the merge process uses the most recent range for the group.
Values before merge:

Source: Membership group/household A: 01/01/2001 to 01/01/2002

Target: Membership group/household A: 06/01/2002 to 01/01/2003
Value after merge:

Target: Membership group/household A: 06/01/2002 to 01/01/2003

Note: If the source constituent was the primary member of a group, the merge process marks the target as the primary member.

Constituent Merge: Group Member Roles

If the source and target constituents are assigned to the same group membership role with dates that overlap, the merge process now uses the widest possible range for those dates. Here are examples of possible scenarios:

Scenario 1: If the date ranges overlap, the process uses the widest range between the two.
Values before merge:

Source: Role A: 01/01/2001 to 01/01/2002

Target: Role A: 06/01/2001 to 01/01/2003
Value after merge:

Target Role A: 01/01/2001 to 01/01/2003

Scenario 2: If the dates overlap and one of the start dates is blank, the process uses the existing start date and the later end date.
Values before merge:

Source: Role B: [blank] to 01/01/2002

Target: Role B: 06/01/2001 to 01/01/2003
Value after merge:

Target: Role B: 06/01/2001 to 01/01/2003

Scenario 3: If the dates overlap and one or more of the end dates is blank, the process uses the earliest start date and the blank end date.
Values before merge:

Source: Role C: 01/01/2001 to 01/01/2002

Target: Role C: 06/01/2001 to [blank]
Value after merge:

Target: Role C: 01/01/2001 to [blank]

Scenario 4: If the dates overlap and the start or end dates are blank on the source and target, the merge leaves the missing values blank and creates the widest possible range based on the dates available.
Values before merge:

Source: Role D: [blank] to 01/01/2002

Target: Role D: [blank] to 01/01/2003
Value after merge:

Target: Role D: [blank] to 01/01/2003

Constituent Merge: Marketing Information

Marketing information, such as source analysis rules data, finder numbers, constituent appeals, and marketing efforts, now merges to the target constituent record.

We also made it easier to ensure duplicate records caused by constituent merges are removed from marketing efforts. For more information about this feature, see Exceptions for Duplicate Records on page 31

Constituent Merge: Modeling and Propensity Custom Ratings

Use the new Modeling and propensity custom ratings merge task to copy the source constituent's modeling and propensity attributes to the target constituent.

If the target does not have a one-per-record attribute and the source constituent does have one of that type, the program copies the source's one-per-record attribute to the target.

The program does not allow constituents to have one-per-record attributes of the same type. If the source and target have attributes of the same type that only support one attribute per record, the merge task excludes the source's attribute. If the merge task excludes a source's attribute, it deletes it from the source.

Constituent Merge: Recognition Programs

In previous versions, an error occurred if you attempted to merge constituents with the same recognition program/level. Now when you merge the two, the source's recognition record is copied to the target and the status of the program record is set to "Inactive (Merge)."

Constituent Merge: Prospect Plans

If a source and target constituents have a prospect plan with the same name and type, a counter is appended to the target's prospect plan name after the merge. For example, "Test Plan" becomes "Test Plan (1)" for the target. If "Test Plan (1)" already exists, it becomes "Test Plan (2)."

Constituent Merge: Stewardship Plans

If a source and target constituents have a stewardship plan with the same name and type, a counter is appended to the target's stewardship plan name after the merge. For example, "Stewardship Plan" becomes "Stewardship Plan (1)" for the target. If "Stewardship Plan (1)" already exists, it becomes "Stewardship Plan (2)."

Constituent Duplicate Management

To help you keep your data clean and prevent duplicate records, we made significant enhancements to the constituent duplicate management process to provide greater flexibility in configuration and more automation of tasks:

• We improved the existing matching algorithm to make duplicate identification quicker and more accurate.

• We enhanced the **Duplicate record check** settings to provide additional configuration options and automation. The new thresholds define the degree of similarity required to consider records matches, possible

matches, or not matches. You manually compare only records that are possible matches, while the program handles all others automatically. For more information, see Constituent Matching Settings on page 14.

• A new duplicate resolution screen provides more information about potential matches. You can quickly compare records and decide whether to update the existing constituent records or create a new ones.

Resolve Duplicate Constituents

Note: The Duplicate record check screen from previous versions still appears for constituent, revenue, revenue update, and sponsorship batches.

When you add a constituent record through batch, import, or the Add an individual or Add an organization screens, the program automatically runs a duplicate check to verify that the record does not already exist in the database. If the new record's match confidence score falls within the range defined for possible matches, the program flags the record as a potential duplicate. On the Possible duplicate matches screen, you can quickly compare the new record to all possible matches in the database. From this screen, you can decide whether to create a new constituent or update an existing record with new information.

For constituent update batches and enhanced revenue batches, you access the Possible duplicate matches screen from the Batch entry screen. A yellow caution symbol appears next to rows that are flagged as potential duplicates. When you click the caution symbol, the row expands to provide a link to the Possible duplicate matches screen.

When you add a constituent record from the Add an individual or Add an organization screen and the program finds potential matches during the duplicate record check, the Possible duplicate matches screen appears automatically.

Note: You must enter a last name/organization name and zip code for the duplicate check to run.

The column on the left displays information from the new record.

The column on the right lists all potential matches in the database, ranked from the highest to lowest match confidence score. The percentage represents the degree of similarity between the first names, last/organization names, addresses, and zip codes. For more information about the match confidence score, see the *Administration Guide*.

When you select a potential match, that record's information appears in the middle column so you can compare the new and existing records side-by-side. Fields in black are exact matches. Fields in red are similar but need careful review. After you compare the records, you can do one of the following:

- If the new record is not a duplicate, click **Add this as a new record**.
- If the new record matches the existing record, click **Confirm this record as a match**.

    When you select **Confirm this record as a match**, several options appear.

You can evaluate each field in red and choose whether to update the value on the existing record (**Replace**) or to leave it as is (**Ignore**). For example, if "Janey" is the first name on the existing record and "Jane" is the first name on an incoming record, you can click **Replace** to update "Janey" with "Jane." If the incoming record has information that is blank on the existing record, you click **Replace** to add that value to the existing record. If you do not want to replace the primary address, email, or phone number on the existing record, you can add the new value as a secondary contact. Fields to be updated appear in green.

Note: When you click the 'i' next to a group of fields, you can view more information about the existing record. For example, if you click the 'i' next to the primary address, a screen displays all other addresses (vacation, business, etc.) associated with the record.

Note: Additional options appear on the Possible duplicate matches screen for batches. To close the screen without changes and automatically open the next matched record, click **Skip**. If you select **Automatically go to the next duplicate exception**, the program automatically opens the next record in the batch with possible matches when you click **Save**.

Direct Marketing

The following enhancements to export definitions are available in *CRM 2.93*. For more information about these features, see the *Marketing Efforts Guide*.

Exceptions for Duplicate Records

We made enhancements to ensure duplicate records caused by a constituent merge are excluded from marketing efforts. When you merge duplicates and then run the **Calculate segment counts** task, source records may be removed from the marketing effort if the source record was deleted or made inactive, and the **Exclude inactive constituents** option is set on the marketing effort. If you calculate segment counts, merge, and then activate or export the effort without updating the segment counts, any records that were deleted by the merge process or now cause duplicates within the marketing effort since you last calculated segment counts are flagged as exceptions and included in an exception file. From the marketing effort's Activation Status or Export Status screens, you can view the number of exceptions or click **Download exceptions** to download the exceptions file.

To remove the duplicates after you activate the effort, select the exceptions file when you run the **Remove members** task. If you do not remove the records before you export, those exceptions appear on the Export status page. When you export the effort, the exceptions are removed from the main export file and the exceptions are included in an exception file. This will provide a clean file for your vendors without requiring you to run the **Remove members** task; however, the exceptions still exist in your effort. You have two options: you may keep the exceptions in the effort so your counts match your initial marketing effort plan, or you may run the **Remove members** task to remove the exceptions so the counts accurately reflect the number of people you sent mailings to.

Exceptions for duplicates may also occur when you import segmented house files or finder files. If you export a part of your house file, merge records, and then reimport the file, you will receive exceptions for any records in the file that were deleted since the initial house file export or for any records that were merged into another record in the import file and now causes duplicate records within the file. For example, you have records A and B in a segmented house file. If you merge A into B and then import the file, record A will be excluded as an exception. Record B will import successfully.

Events

The following *Events* enhancements are available in *CRM 2.93*. For more information about these features, see the *Events Guide*.

Auction Packages

You can now add a package directly to an auction from the auction event record. On the action bar, click **Add**, and select **Auction package**. The Add an auction package screen appears with the auction already selected.

General Ledger Setup

The following General Ledger mapping enhancements are available in *CRM 2.93*. For more information about these features, see the *Administration Guide*.

Membership Add-ons in the Ledger

Membership programs can have add-ons, which are additional offerings to be sold or included in a membership. Membership program add-ons include items such as a parking pass or adding another member to the membership. When constituents join a membership program that has add-ons, the constituents have the ability to include or purchase the additional offering or service.

To create appropriate ledger distributions for membership add-ons, we added "Membership add-on" as an application type. This application type appears in several areas of General Ledger Setup in *Administration*. For more information about General Ledger Setup, see the *Administration Guide*.

Note: If your organization plans to use membership add-ons, you must map the new Membership add-on application type prior to selling or including membership add-ons for a membership. The program does not allow unmapped transactions. If your organization does not plan to use membership add-ons, no change to your ledger mapping setup is necessary.

Define Transaction Mappings for the Development Office

In order to generate ledger distributions for payments made to the development office, you must first map the transactions to GL accounts or account codes. To access the Transaction Mappings page, click **Define Transaction Mappings** on the General ledger setup page of an account system. To access the Development Office page, click "Development."

On the Payments tab, when you add or edit a transaction mapping and select to map application types, you can now select "Membership add-on" from the Application type screen.

Define Segment Mappings

To access the Segment Mappings page, click **Define Segment Mappings** on the General ledger setup page of an account system. From the Segment Mappings page, you can view each segment you defined as part of your account structure. For a segment that is calculated based on application type, click the segment to view all application type segments and their values, including the new "Membership add-on" application type. Select "Membership add-on" and click **Edit** or **Edit All** to map the segment value. By mapping the segment value, you specify how the segment value is used when generating ledger distributions on transactions.

Import

We made significant enhancements to the import process to reduce the amount of time necessary to configure imports and resolve data issues. These enhancements include:

- New configuration options allow you to map to import files on SFTP servers and network directories. For more information, see Import File Locations on page 37.

- You can now create recurring import processes for imports that you use multiple times with different import files. For more information, see Recurring Imports on page 39.

- You can now import fixed-width and other delimited file formats. Rather than manually map import fields to batch template fields each time you create an import process, you can now select a file mapping template. For more information, see Import File Mapping Templates on page 39.

- New options allow you to automate the validation and commitment process for imported batches. For more information, see Batch Commit Options Tab on page 35.

- To improve the quality of imported data and prevent duplicate records, import processes now include constituent matching settings for duplicate detection. For more information, see Matching Options Tab on page 36.

- The import process status page now includes details to make it easier to trace transactions from import files. The additional information also helps you quickly identify and resolve issues in import files. For more information, see Import Process Status Page on page 43.

Import Page

To make information easier to find, we changed the columns on the Import page. We moved the **File name** and **User name** columns to the import process status page. We added the **Batch template**, **Last run**, and **Last run status** columns. You can filter the imports that appear in the list by batch template. **Date added** is now labeled **Date created**.
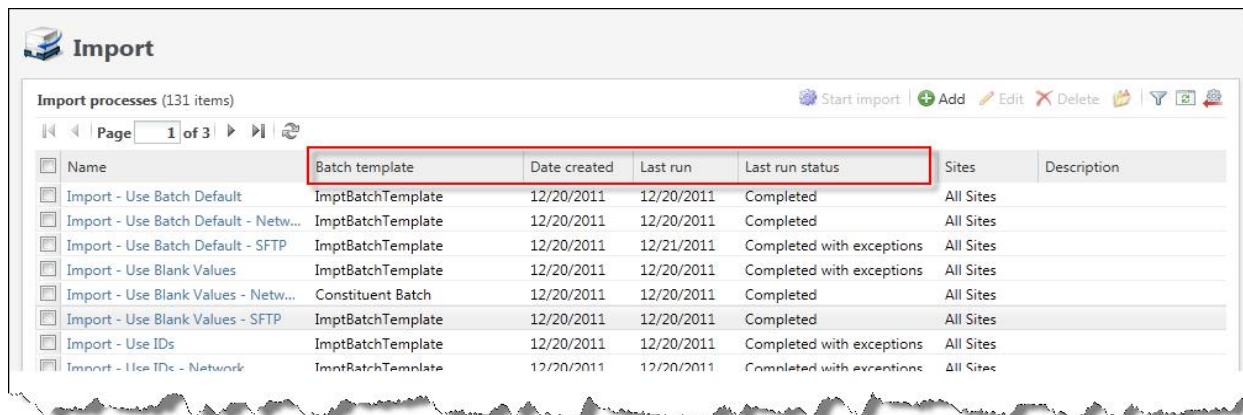
Add Import Process Screen Changes

We updated the Add import process screen to support new functionality and make it easier to use.

When you create a new import process, you now select the batch template as the first step.
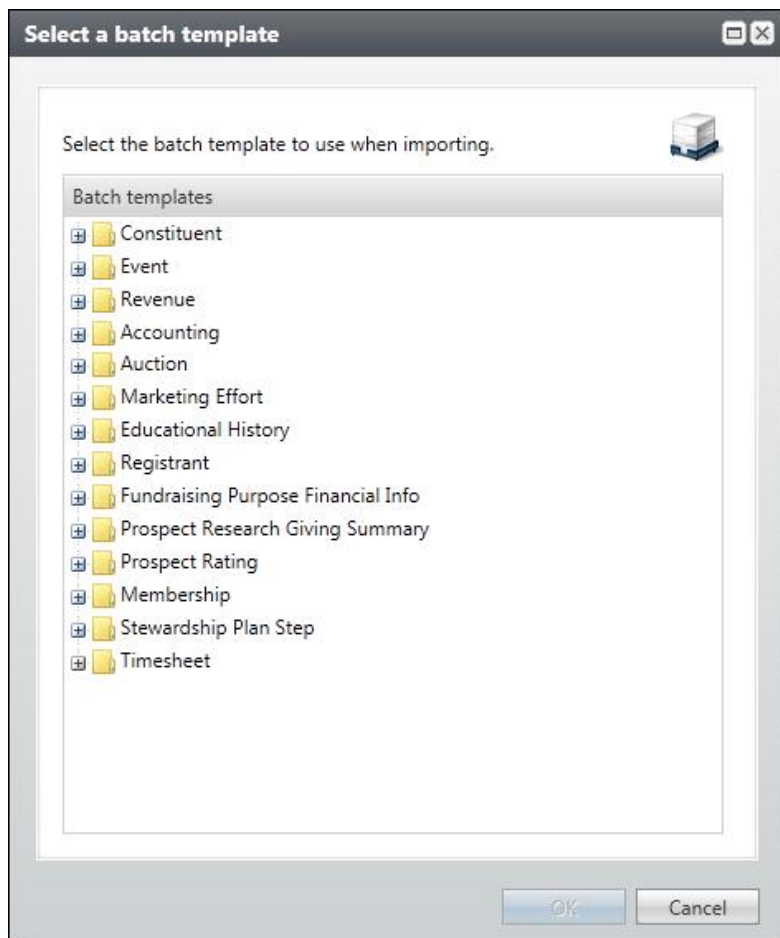
General Tab

Several options on the General tab were updated to support new functionality.

- Under **Import file**, you can now select whether to create a recurring import and which import source to use. For more information, see Recurring Imports on page 39 and Import File Locations on page 37.

- Under **Field mapping**, you can now select whether to map fields manually or select a file mapping template. For more information, see Import File Mapping Templates on page 39.

Batch Commit Options Tab

The new Batch commit options tab allows you to automate the validation and commitment process for imported batches.
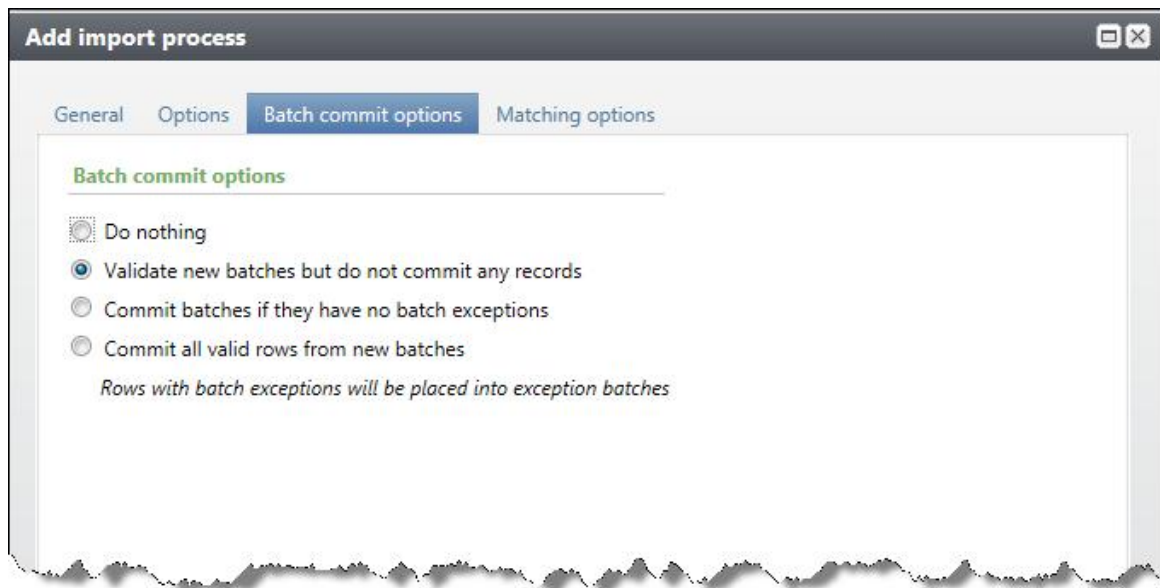
- **Do nothing:** Select this option to manually validate and commit the batch at a later time. Use this option when another user must review the batch before you commit it, or when you need to skip the extra validation process to ensure the batch is committed on time.

- **Validate new batches but do not commit any records:** Select this option to validate the batch and then later commit it manually. Use this option when another user must review records before you commit the batch and time allows for the extra validation process. For example, you could schedule the validation to run overnight and then manually review and commit the batch in the morning.

- **Commit batches if they have no batch exceptions**: Select this option to validate the batch and then commit it automatically if there are no batch exceptions. Use this option when you need to enter records quickly, but you also want to manually review any errors in the file.

- **Commit all valid rows from new batches:** Select this option to validate the batch and then automatically commit each valid row. If a row does not validate, the program adds it to an exception batch that you can review later. Use this option when you need to add data as quickly as possible.

Matching Options Tab

The new Matching options tab appears for imports that use the following batch template types: constituent update, enhanced revenue, revenue, and revenue update. The settings default from the Constituent Matching Settings page in *Administration* or from the associated batch template if that template uses different thresholds.

You may need to use different matching settings for some imports. For example, if data imported from a particular vendor requires extra scrutiny, you can narrow the Matched constituents and Possible matches thresholds so that more manual review is required.

To turn off duplicate checks for an import process, clear **Check for records that match existing records**.

For more information about constituent matching settings, see Constituent Matching Settings on page 14.

Import File Locations

The new **Configure Import sources** configuration task on the Import page allows you to define the locations for import files on SFTP servers and network directories. This task replaces the **Configure import options** task to provide more functionality. Each source includes a URL or file path and the credentials to access the file location. You must configure import sources before you can create import processes.

From the Import Sources page, click **Add**, **SFTP server** to create import sources for an SFTP server. The Add SFTP server import source screen appears.
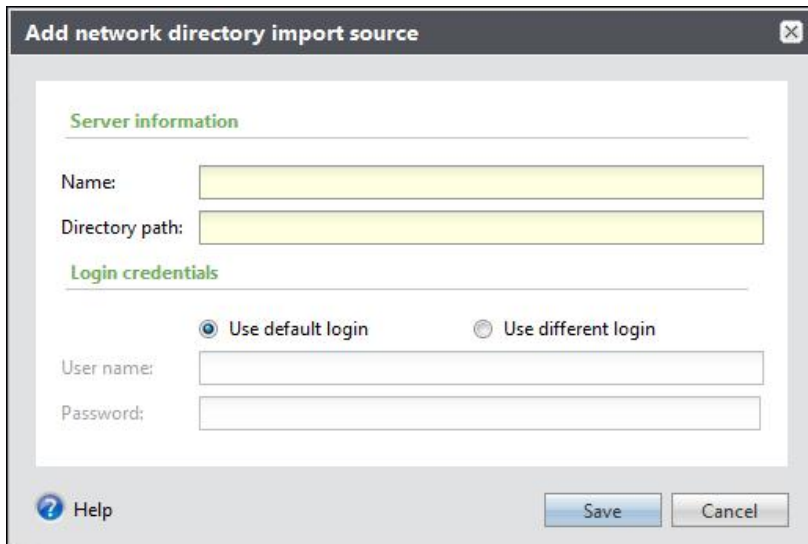
To add an import source for a network directory, click **Add**, **Network directory**. The Add network directory import source screen appears.
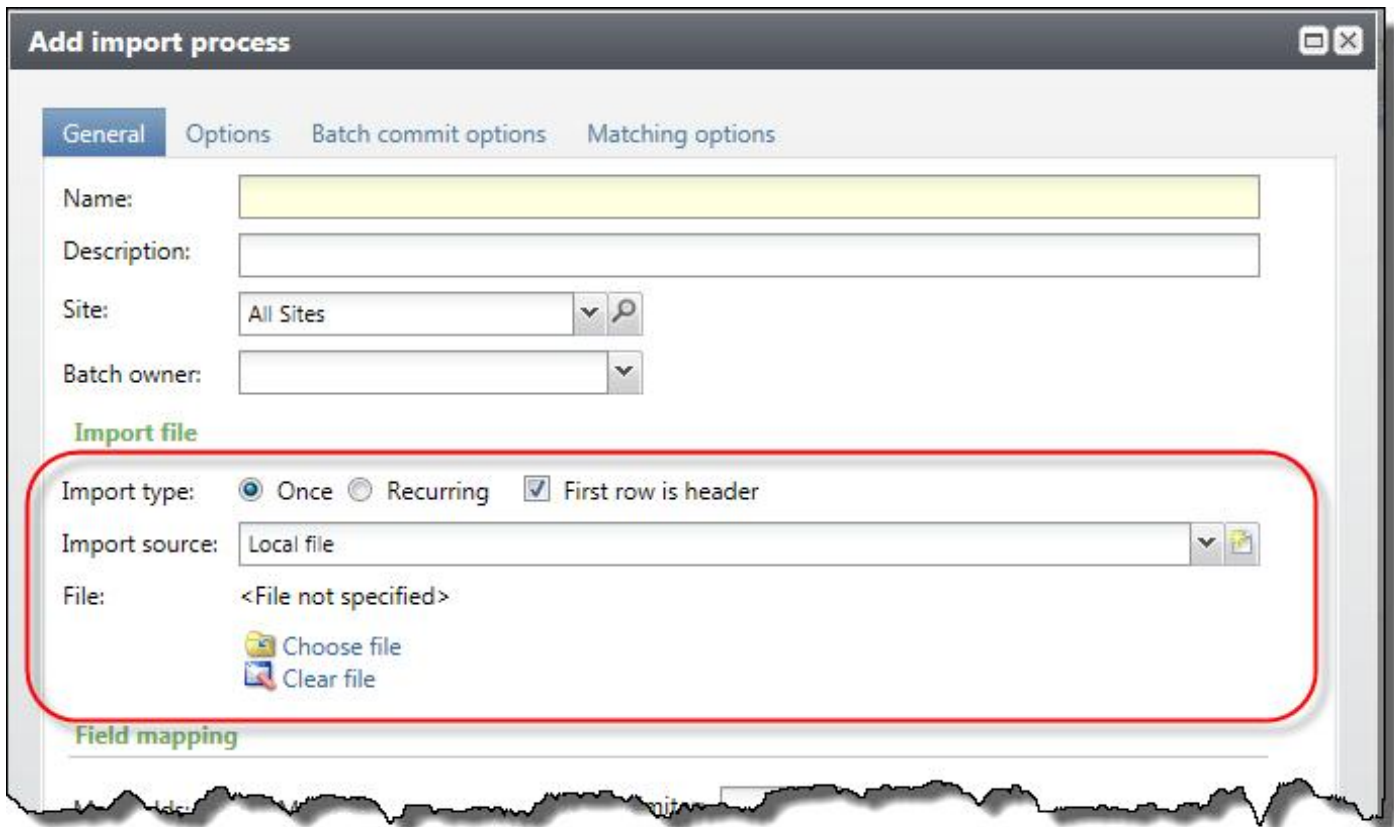
New options for import sources also appear on the Add import process screen.

In the **Import source** field, select an import source location where import files are stored on the local machine, SFTP servers, or shared network directories.

- **Local file** — If you select **Once** as the import type, you can select a file from your current workstation.
- **Network directory** — If you select **Once** as the import type, you can select the network directory import source and enter a file pattern in the **File** field.
- **SFTP server** — If you select **Once** or **Recurring** as the import type, you can select an SFTP server import source. If the URL entered on the SFTP import source does not already include a subdirectory, you can enter one in the **Subdirectory** field.

If you select an SFTP server or network directory import source, you can use wildcards (*,?,[],#) in the **File** field to create a file name pattern for recurring imports.

Recurring Imports

You can now create recurring import processes for imports that you use multiple times with different import files. To create a recurring import, select **Recurring** for the **Import type** on the Add import process screen and select the SFTP import source location that holds the import files.

In the **File** field, use wildcards (*,?,[],#) to create a file name pattern for recurring imports. This allows the import process to pull files with similar names from the same location. For example, if your organization downloads a file from an SFTP site each night and the file name is always "Import" plus a version number (i.e., Import123.csv), enter the file name as "Import*.csv." The import process will grab all new files in the folder that fit the pattern, such as Import4 or Import79. After an import process uses a file, the program archives it in a separate directory to ensure it does not import the file again.

Import File Mapping Templates

An import file mapping template specifies how to map fields from an import file to a batch template. The template allows you to map fields once rather than manually mapping them each time you create an import process.

You can create import file mapping templates for delimited and fixed-width import files. To create a template, under **Configuration** on the Import page, click **Import file templates**. On the Import File Templates screen, click **Add**, **Delimited template** or **Add**, **Fixed-width template**.
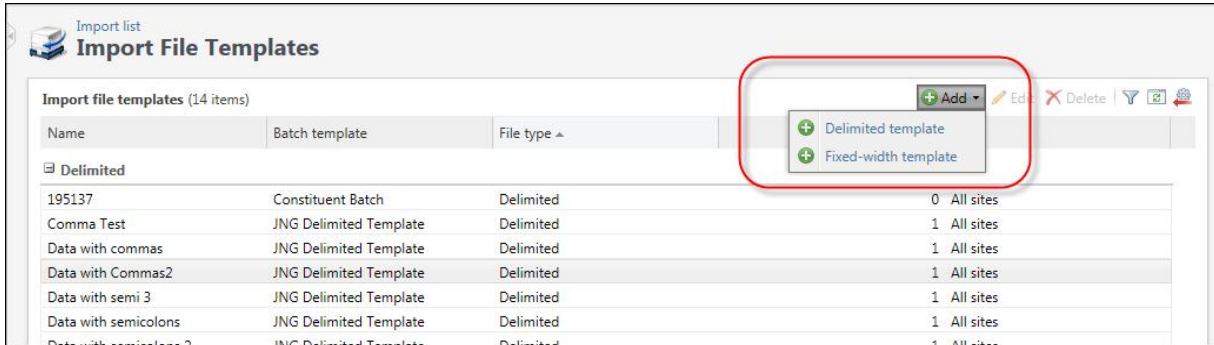
For delimited files, this is a one-step process where you map fields from a sample import file to batch template fields.

For fixed-width files, mapping instructions are defined by an external layout file provided by your vendor that includes (at a minimum) a column of field names and three columns of numbers that represent the start and end positions and character widths for each field. You map the fixed-width layout file in two steps. First, you map the field name and start and end positions to their program values, and then you map the import fields to the batch template fields. As you map import file fields, the program automatically calculates start positions, end positions, and field widths based on instructions from the layout file.
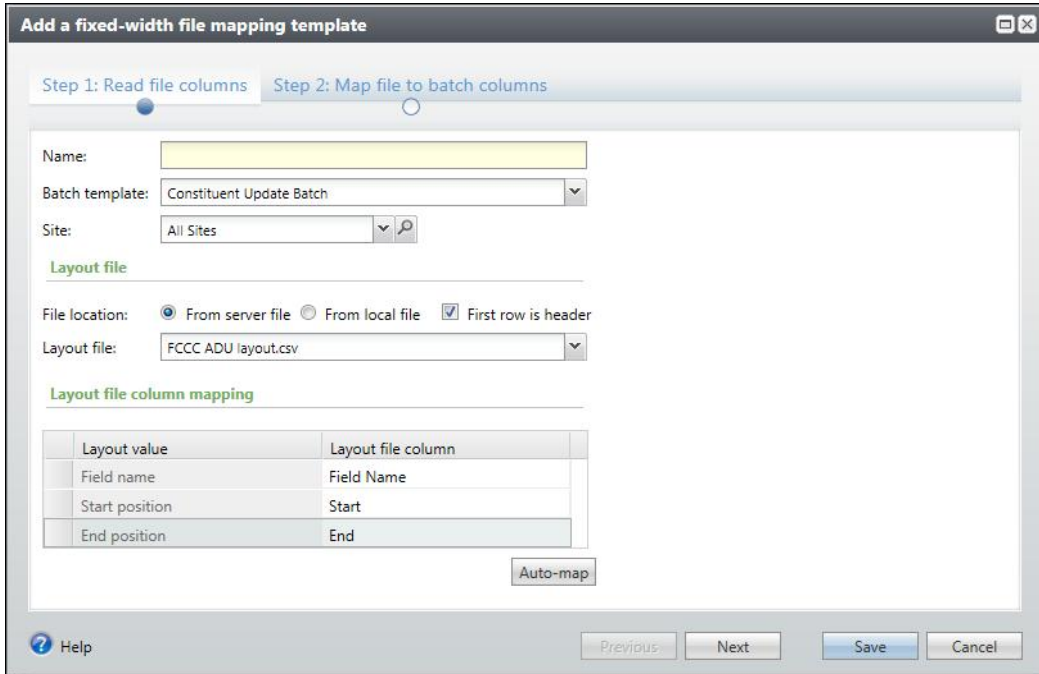
After you create an import file mapping template, you can use it with any import process associated with the same batch template. On the Add import process screen, select **Using file mapping template** under **Field mapping** and then select the template.

Import Process Status Page

New details now appear on the process status after you run an import. These details make it easier to track transactions for auditing and reconciliation purposes from the original import file, to a batch, and finally to a constituent record. The additional information also helps you quickly identify and resolve issues in import files that prevent data from importing.

The top summary section includes the following additional details: the current job scheduling, file mapping template, creation date, number of times run, and number of batches created.

The Recent Status tab now includes links to the last batch created from the process and to the exception batch if exceptions occurred.

On the History Tab, you can now expand an instance of the import process to view additional details such as why an import failed. If the import was set to commit batches automatically, this section includes the number of records imported and committed, as well as links to the committed batch and exceptions batch. If the import was not set to commit batches automatically, this section includes a link to the uncommitted batch and displays the scheduled commit date and time. If the process fails, you can click **Export** to export a copy of the import file to correct errors and reimport. For revenue batch types, a totals section includes the projected vs. imported number of records and total revenue.

Memberships

The following *Memberships* enhancements are available in **CRM 2.93**. For more information about these features, see the *Memberships Guide*.

Membership Upgrade Notes for 2.93

In previous versions when you added membership programs, the Add screen contained some basic information about the program, but you had to go to the program record to enter additional details. With this version, when you add a membership program, you complete a series of tabs with information about the program on one screen. As you make choices and enter information about the program, the tabs and fields change to reflect the information needed for the specific type of program.

You can now have new types of membership programs, including annual, recurring, and lifetime programs. You can also have programs or levels based on dues or contributions. For information, see Membership Programs on page 47. Existing programs are upgraded as annual, dues-based programs.

When you add a new membership program, you select a category for it, such as Museum. Existing membership programs will be upgraded with a category of None; however, you can edit the category on the General tab of the membership program.

Note: We recommend you commit any batches with membership transactions before you upgrade. If you have existing uncommitted batches with membership transactions, you can still commit those batches after the upgrade. However, if you need to edit details about the membership in the batch, you will need to remove that transaction from the existing uncommitted batch and re-enter it using the new Enter membership dues batch.

The Membership Form part in *Blackbaud Internet Solutions* is considered deprecated with the 2.93 release and can no longer process web transactions. In version 2.93, you cannot create new Membership Form parts. Before you upgrade, we recommend that you delete any existing Membership Form parts since they will no longer process transactions.

The new membership functionality requires Basic GL. It will not work with Legacy GL.

Membership Terms and Levels

- In previous versions, "Lifetime" was a term for a membership program. Now lifetime programs are a different type of membership program.

  Existing programs with a term of "Lifetime" will be upgraded with the term length set to 150 years, which sets an expiration date. We recommend you create new lifetime membership programs and mark the converted ones inactive. If you don't, users and members will see the term length listed as 150 years, as well as the expiration date, which might cause confusion.

- Membership terms (such as one year or two years) used to be set up for each level. For example, the individual level might have only a one-year term option, but the family level might have both one- and two-year terms. With this release, terms are established for the entire membership program, not the levels. Existing membership programs with different terms for different levels will now have those terms available for all levels; however, the combinations that did not exist before will be marked inactive. In the example above, the individual level will now have a one-year term that is active and a two-year term that is inactive. The family level will now have one- and two-year terms that are both active.

  When you add new membership programs, you enter a price for all term and level combinations. If the combinations should not be used, save the program and, from the Prices tab on the program, click **Edit**. When you edit terms, levels, and prices, you can mark the unneeded term and level combinations inactive.

- When you create a new program and enter your levels, you should begin with the lowest or most basic level first. As you add the levels on the Add a membership program screen, you cannot change the order of them. However, you can highlight a row and click **Insert** to insert a blank row above the one you highlighted. Once you save the program, on the Levels tab, you can select a dues-based level and click **Promote** or **Demote** to adjust the order. You cannot reorder contributions-based levels or levels in a contributions-based program.

- In previous versions, if you entered "0" for the number of membership cards or children allowed per level, this actually meant unlimited. Now "0" means zero and no membership cards can be issued or no children can be added to the membership.

    Existing membership programs with "0" for the number of cards will now have those numbers set to match the number of members allowed for the level. For example, if you have a level set to allow five members and the number of cards is "0," when you upgrade the number of cards allowed for the level will be "5."

Warning: If you currently have membership programs with the number of cards set to zero and you intend to not issue membership cards, you must manually change those numbers back to zero after you upgrade.

    Existing membership programs with "0" for the number of children allowed will still have the number of children set to "0."

Warning: If you currently have membership programs with the number of children allowed set to zero and you used that to mean the number of children is unlimited (due to the way this field worked before), you must manually change those numbers to something artificially high to represent the highest number of children you expect to be added to the membership.

- New membership programs must have one or more levels. Existing membership programs with no levels will need to be recreated after the upgrade.

- New membership programs can have a maximum of 20 levels. Existing membership programs can have more than 20 levels. However, when you edit benefits for a membership program, only the first 20 active levels appear. If you have more than 20 active levels, you can temporarily mark some of them inactive in order for other levels to display on the Edit benefits screen.

- In previous versions, you could create membership types to associate with membership levels. For programs added prior to this version, you can access membership types by clicking **Edit types** on the Terms tab of the program. New programs you create do not have membership types.

- On levels in membership programs, the field "Tier" has been renamed to "Reporting group." This field allows you to report and compare similar levels of different membership programs.

Membership Promotions

Membership promotions can now apply to specific programs only, instead of to all programs. Previously, any membership promotion could be used for any membership program. When you create a program, you select which promotions to allow.

The Enter membership dues batch allows you to select only the membership promotions associated with the program.

Promo code promotions cannot be associated with specific membership programs. Promo code promotions can be used with any membership program.

Membership Renewals

- In previous versions, renewal windows were set on each level in a membership program. Now there is one renewal window for each program which applies to all levels within the program.

    If you have a program with different renewal windows for each level, when you upgrade, those different renewal windows will be respected. However, if you click **Edit** on the Renewals tab of the program and then click **Save**, only one renewal window will apply for all levels in the program.

    Renewal windows can be no longer than 12 months. If you have a program with a renewal window longer than 12 months, when you upgrade, the renewal window will automatically be adjusted to 12 months.

• In previous versions, when you set expiration dates for membership programs, you could enter a specific date. In addition, you could add "push to the next period" dates. For example, if you entered 12/31 in the **expiration date** column and you entered 09/01 in the **Push to next period after** column, the expiration date for a constituent who joined on or after the first of September was the end of December of the next year, not the current year. You could have entered multiple rows of dates in this grid if you wanted to expire and push multiple dates throughout the year.

Now you can choose a specific expiration date, but there are no "push" dates. If your membership term is fixed, you can enter a specific date for the expiration date.

When you upgrade, existing membership program expiration dates and "push" dates will continue to work as before. However, the Renewals tab on the program will not display your expiration date settings correctly. If you click **Edit** on the Renewals tab of the program and then click **Save**, the expiration date is the specific date entered and there are no "push" dates.

The "End of fiscal year" and "End of calendar year" settings for expiration dates have been removed. You can use a fixed membership term and enter the specific date to accomplish the same thing.

Membership Statuses

Membership statuses (such as active and lapsed) used to be calculated automatically. With this release, membership statuses change based on a global change process. For more information, see Update Membership Status Global Change on page 52.

Note: We recommend you set up the Update membership status global change process to run on a regular basis (nightly or weekly) to keep these statuses up to date. If your membership programs expire only on a monthly, quarterly, or yearly basis and all memberships expire at the same time, you can run the process less frequently.

Add Memberships

In this version, you add all membership dues transactions through membership dues batches. In previous versions, you added membership payments through the Add a payment screen or Enhanced revenue batch. Now you add all membership transactions with the Enter membership dues batch.

Note: The Enter membership dues batch is not supported in the click-once version of the program.

Transfer Memberships

You can transfer a membership from one constituent to another. Previously, if the second constituent already had a membership in the same program, the two memberships would be merged. With this release, a transfer is a simple transfer with no merge functionality. If the second constituent already has a membership in the same program, you won't be allowed to transfer the membership to the constituent.

Membership Programs

From *Memberships*, you can manage your membership programs. You can also access membership-related reports and tasks.

There are three types of membership programs.

• Annual programs are for memberships of a specific length with an expiration date.

• Recurring (or sustaining) programs are for memberships with no expiration date as long as a set amount is paid on a recurring basis.

- Lifetime programs are for memberships with no expiration date as long as a set amount is paid in full within a specific timeframe.

In addition to the membership program types, you must determine how people obtain the membership: by payment of dues, by contributions above a certain level, or a combination of both. Revenue for dues-based memberships is typically reported as membership revenue and posts to ledger accounts specifically for memberships, whereas revenue for contributions-based memberships is typically reported and posts as contributions or donations. You might also have a membership program that is a hybrid of these. Lower levels may be dues-based, while some higher levels, like giving societies, may be awarded based on cumulative contributions.

In previous versions when you added membership programs, the Add screen contained some basic information about the program, but you had to go to the program record to enter additional details. With this version, when you add a membership program, you complete a series of tabs with information about the program on one screen. As you make choices and enter information about the program, the tabs and fields change to reflect the information needed for the specific type of program.

Membership Add-ons

Membership programs can have add-ons, which are additional offerings to be sold or included in a membership. Add-ons include items such as a parking pass or a guest membership. When constituents join a membership program that has add-ons, they can include or purchase the additional offering or service.

"Membership add-on" is a new revenue application type and will need to be mapped to the ledger. For more information about the ledger, see Membership Add-ons in the Ledger on page 32.

To manage your add-ons, from *Memberships*, click **Add-ons** under **Tasks**. The Add-ons page appears. From this page, you can add, edit, and delete add-ons. After you create add-ons, you can associate them with membership programs.

Note: Add-on fields are not available in the Print Membership Cards process or the Membership Renewal Notice process. This means cards, acknowledgements, and renewal notices cannot include information about the add-ons.

Constituent Membership View

On the Memberships tab of the constituent record, you manage memberships for the constituent. This tab displays all memberships for the constituent, along with basic membership information for each one, such as membership program name, level, status, and the names of the members. The tab also includes the membership expiration date and quick links to renew the membership, to add an interaction, and to issue a membership card.

You can click on the name of the program for each membership on the tab to access the membership page with more detailed information.

On the Membership page, you view all the information about the membership for the constituent. This includes information, such as the membership program and level, member ID, status and type, member since date, and the membership level terms. Depending on your security rights and system role, you perform functions to manage the membership such as add or renew a membership and cancel a membership.

Enter Membership Dues

From *Memberships* and *Revenue*, you can now add membership dues transactions received from constituents, such as to join or renew memberships or purchase memberships as gifts for others. When you add a dues transaction, you enter information about the membership, its members, and any additional information such as benefits or add-ons. Additionally, if the transaction applies to more than only the membership, such as a payment that includes a donation as well as membership dues, you can enter information about how to apply the payment.

You can enter a single transaction or multiple transactions at one time. When you start to add membership dues transactions, you select a membership dues batch template to use with the transactions.

Membership transactions are supported only in membership dues batches, not in other revenue batches.

To add membership dues transactions, click **Enter membership dues** from *Memberships* or *Revenue*.

Warning: If a membership dues batch contains payments by credit card or direct debit, you must process these transactions before you commit the batch. To process credit card transactions from the Enter Membership Dues page, click **Credit Card Processing** under **Tasks**. To process direct debit transactions, click **Generate direct debit file process** under **Tasks**. For information about how to process credit card or direct debit transactions, see the *Revenue Guide*.

The new Enter membership dues batch is not supported in the click-once version of the program. It is supported in the web-based version only.

Membership Contribution Processes

Contributions-based membership programs need to determine if a donor's cumulative contributions qualify that donor for a membership or for an upgrade. You can add a Membership contribution process to run to make those determinations for all contributions-based programs and levels or for one specific program.

To access membership contribution processes, from *Memberships*, click **Membership contribution process** under **Tasks**. The Membership Contribution Processes page appears. From this page, you can add, edit, and delete processes. You can click on the name of a process to access the process page. You can also select a process and click **Start process**.

Note: We recommend you set up the Membership contribution process to run on a regular basis (nightly or weekly) to keep membership in these programs up to date. If qualification for these programs happens only on a monthly, quarterly, or yearly basis, you can run the process less frequently.

Update Membership Status Global Change

When you set up membership programs, you determine how and when the membership status of a member should change once the membership has expired, based on the rules for the membership renewal window. For example, a member's status might change to lapsed once the membership expires. You can run the Update Membership Status global change to go through your membership programs and update the members' statuses automatically based on the rules for the renewal window for the programs.

To update membership statuses, go to *Administration* and click **Global changes**. On the Global Changes page, click **Add** and select the Update Membership Status global change definition. You can use a selection to specify the membership programs to include.

If your organization uses site security, you can also specify which sites to include.

Note: We recommend you set up the Update membership status global change process to run on a regular basis (nightly or weekly) to keep these statuses up to date. If your membership programs expire only on a monthly, quarterly, or yearly basis and all memberships expire at the same time, you can run the process less frequently.

Membership Activity Report

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *OLAP and Data Marts Guide*.

To run the report, select your Membership program under the Filters tab, and specify the proper dates in the Period fields. Click **View Report**, and you will see information on amounts of members, renewals, upgrades, drops and other membership activities. You can click on specific numbers in the report to view a breakdown of those figures.

Active memberships will include memberships that were valid at any point during the specified date range. Retention rate is calculated as the number of memberships at the end of the date range subtracted by the number of memberships that joined during the date range, subtracted by the number of memberships that rejoined during the date range, and then divided by the amount of memberships at the start of the date range.

Use the **Layout** tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click **View Report** to view the statistical breakdown.

Note: Address fields (Country, State, County, City) are pulled from the primary address of primary member. Education fields (Class Of, Degree) are pulled from the primary education of the primary member.

Note: Click **Export** to export the report into multiple formats, including XML, PDF, Excel, and Word.

Membership Actuals Report

This report compares contributed revenue and earned revenue in two selected time periods. You can also view the variance, or how spread out the distribution is, of contributed and earned revenue from this report. Contributed revenue includes any revenue that is associated with a contributions-based membership. Earned revenue includes any revenue that is associated with a dues-based membership.

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *OLAP and Data Marts Guide*.

To run the report, select your Membership program under the Filters tab, and specify the proper dates in the Period fields. Click **View Report**, and you will see a comparison of Contributed and Earned Revenue in the two time periods. You can click on specific numbers in the report to view a breakdown of those figures.

Use the **Layout** tab to divide membership activity statistics into groups, including country, ethnicity, month, and level. Click **View Report** to view the statistical breakdown.

Query and Export

The following *Query* enhancements are available in ***CRM 2.93***. For more information about these features, see the *Query and Export Guide*.

Query and the Web-Based User Experience

The web-based user experience offers new features, and changes to existing functionality, within *Query*. We recommend you review these changes before working in *Query*.

Ad-hoc Query

When you select a source view to add an ad-hoc query, frequently used source views now appear under **Most commonly used** in the list. These source views are the ones most commonly used across the organization, not per user.
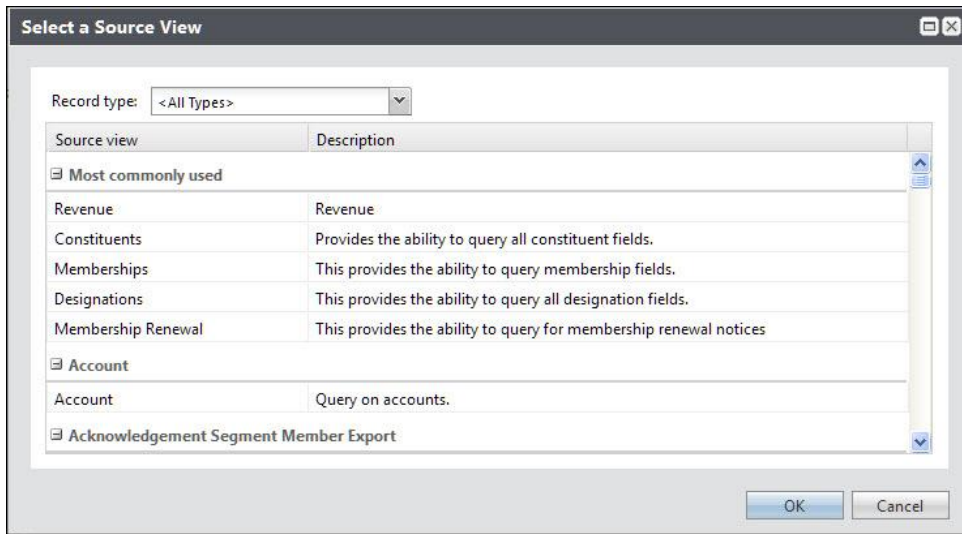
The New Ad-hoc Query screen and Edit Ad-hoc Query screen now feature several enhancements to help ease the creation and use of a query. These enhancements range from more instructive names for tabs and frames to completely new features. You can now also manage the query's properties as you add or edit the query.

On the Select filter and output fields tab (previously the Output/Filters tab), you can browse to and select the output fields to include in the query results. To quickly find a field, you can now also search by its name in the **Find field** field. Under **Include records where**, you can apply filter criteria to fields. Under **Results fields to display**, you select the output fields to include in the results. You can continue to summarize amounts and dates by criteria such as SUM (total), MIN (smallest), or MAX (largest). To change how the name of a selected output field appears in the header of an export file, you can now click **Change column header** and enter the name to appear in an export.
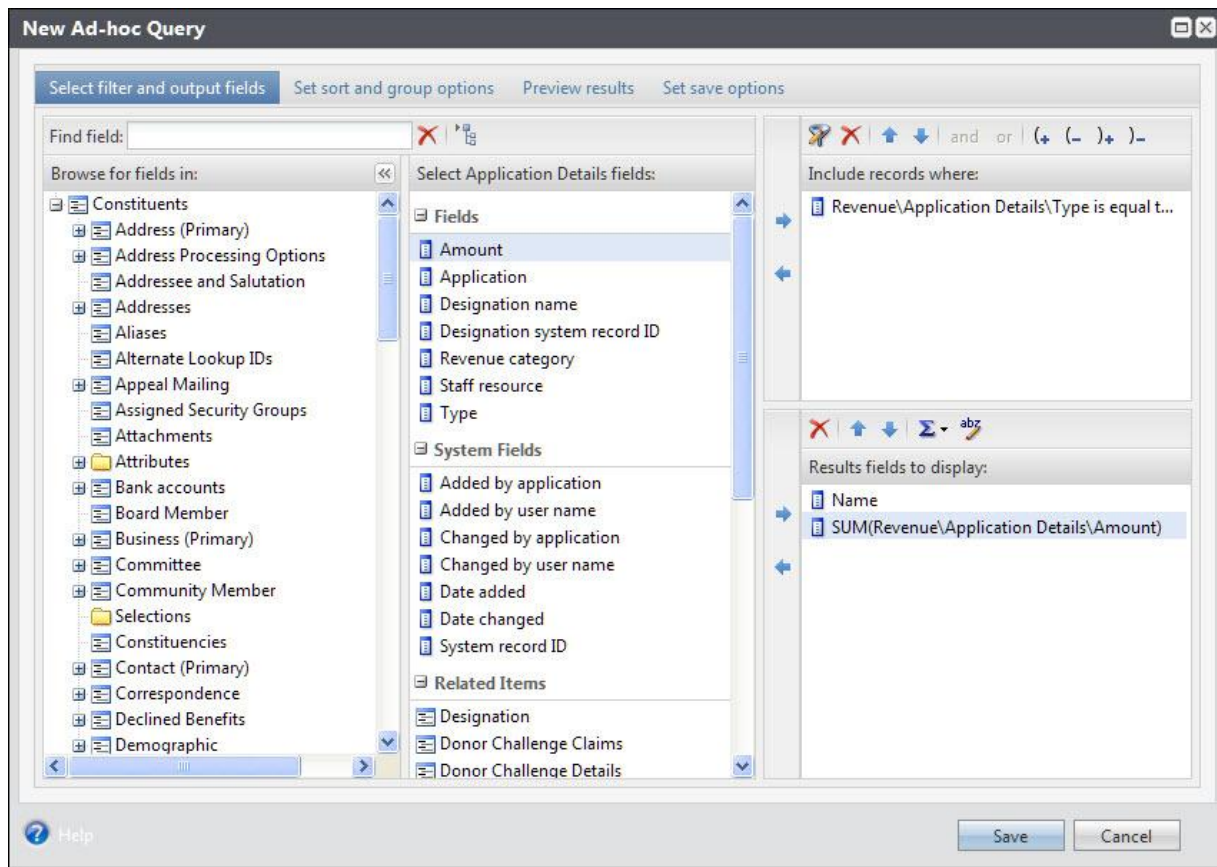
On the Set sort and group options tab (previously the Sort/Group Filters tab), you select the fields to use to sort records in the results and how to order the results, such as ascending or descending. If you summarize output fields, under **Include records where**, you can apply filter criteria to those records. For example, if you select to view the sum of revenue transactions from constituents, a constituent appears one time rather than for each transaction.
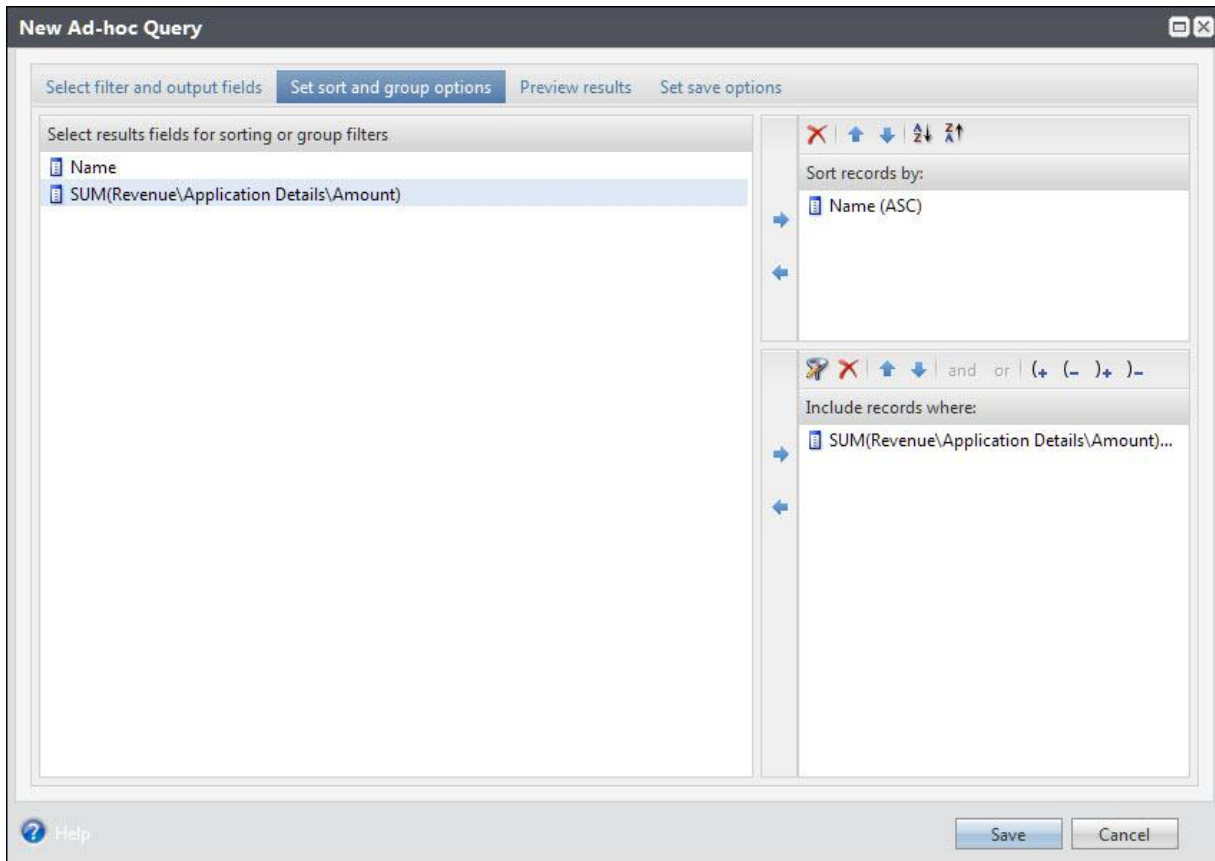
On the Preview results tab (previously the Results tab), you can continue to preview the first 500 records of your query results. From this tab, you can also now select whether to display a column for the query ID of each record. You can also view the Structured Query Language (SQL) statement used to generate the query or download the preview to a comma-separated values (*.csv) file or XML spreadsheet (*.xlsx) file, such as for use in Microsoft *Excel*.

On the new Set save options tab, you can enter a unique name and description to help identify the query. You can also manage the properties of the query, such as whether to create a selection based on its results and which users can use and manage the query. Previously, you managed this information on a Query Properties screen.

Smart Query

When you add or edit an instance of a smart query, the Previews tab now includes new features. From this tab, you can now select whether to display a column for the query ID of each record. You can also download the preview to a *.csv file or XML spreadsheet (*.xlsx) file, such as for use in Microsoft *Excel*.

On the New Smart Query screen and Edit Smart Query screen, the Set save options tab now appears. On this tab, you can enter a unique name and description to help identify the query. You can also manage the properties of the query, such as whether to create a selection based on its results and which users can use and manage the query. Previously, you managed this information on a Query Properties screen.

Query Results

From a query's results page, you can now download the results to a *.csv file or XML spreadsheet (*.xlsx) file, such as for use in Microsoft *Excel*. To download the results, click **Export** and select the file format to download.

Previously, you could only download and save the query results as a Microsoft *Excel* workbook (*.xls) file.

Revenue

The following *Revenue* enhancements are available in **CRM 2.93**. For more information about these features, see the *Revenue Guide*.

Reporting Filters

When you add a recognition filter, you can now select whether recognition for pledge payments should appear in the constituent's recognition history if they already received recognition for the associated pledge, or only if they did not receive recognition for the associated pledge.

Treasury

The following *Treasury* enhancements are available in ***CRM 2.93***. For more information about these features, see the *Treasury Guide*.

Blackbaud Merchant Services Automatic Settlement

If your organization processes credit cards through ***Blackbaud Merchant Services***, you can now select to automatically settle transactions based on your disbursement activity. To automatically settle ***Blackbaud Merchant Services*** transactions from *Treasury*, click **Enable BBMS auto settle** under **Credit card transactions** on the Outstanding Credit Card Transactions page. When you enable automatic settlement, the program receives information from ***Blackbaud Merchant Services*** about the transactions included in a disbursement and marks those transactions as settled.

To disable the automatic settlement, such as to manually upload the disbursement report at a different schedule, click **Disable BBMS auto settle**.

Create Deposits Process

From the Treasury page, we added the **Create deposits** and **Review deposits** tasks under the new **Processing** section. Use these tasks to create and work with deposit templates, and review and run deposit processes automatically. All eligible payments made through *Treasury* (miscellaneous payments) as well as back office and online sales payments can be added to the deposit process. Examples of back office revenue include payments made as part of a batch or from a revenue record outside of *Treasury*. For more information about creating and working with deposit templates and deposit processes, see the *Treasury Guide*.

- If your organization implements site security, the **Review deposits** link does not appear on the Treasury page. Click **Create deposits** under **Processing** to access the Create Deposits page. From this page, once you

add a deposit process, you can click a deposit process to access the Deposits page. From the Deposit Templates tab, you can add, edit, or delete deposit templates for a deposit process.

- With *Multicurrency*, currency fields and columns appear in several areas where you work with deposit processes and display the payment amount in transaction currency. Currencies are associated with the account system for the bank account specified for a deposit template. The program considers a deposit template's currency when determining if template conflicts exist during the create deposit process. For example, two deposit templates cannot share the same settings for revenue source, payment method, and currency when running the create deposit process. When the program creates deposits, it uses the most recent daily or corporate rate for payments that must be converted to your bank's currency. We recommend you review the deposits after they are created to confirm the exchange rates and converted amount.

    When the program creates deposits, it uses the most recent daily or corporate rate for payments that must be converted to your bank's currency. We recommend you review the deposits after they are created to confirm exchange rates and converted amounts.

    When a deposit process includes payments with multiple currencies, the deposit process automatically creates separate deposits for each type of currency. The deposit summary report groups the payments in a deposit according to the payment's currency. When multiple currencies are included in the report, the report total displays "N/A."

- If your organization configures multiple ledger account systems and implements site security, and you have rights to work with multiple account systems, the **Account system** field appears in several areas where you work with deposit processes. Only one deposit process can exist for an account system.

- We added the new Deposit Summary report that displays a list of deposits created during a specific deposit process. You can view this report from both the Recent Status tab and History tab of a deposit process. To view the report from the Recent Status tab, click **View report**. To view the report from the History tab, select the process to view and click **View report**.

    With *Multicurrency*, when a deposit process includes payments with multiple currencies, the deposit process automatically creates separate deposits for each type of currency. The deposit summary report displays the payments in a deposit and groups them according to the payment's currency.

To improve the layout of the Treasury page, we created a **Transactions** section that now includes the following tasks: **Add a deposit**, **Deposit search**, **Link multiple payments**, **Add a miscellaneous payment**, and **Miscellaneous payment search**. Due to the reorganization, the same tasks exist, but the **Payments** and **Deposits** section titles no longer appear.

Web

The following *Web* enhancements are available in *CRM 2.93*. For more information about these features, see the *Web Transactions Guide*.

In addition to the CRM enhancements in *Web*, **Blackbaud Internet Solutions** includes new CMS features in **2.93**. For information about these features, see **Blackbaud Internet Solutions** New Features Guide.

Integration Options

You can now select an email address type to assign to email addresses that you download from your **Blackbaud Internet Solutions** website. On the Configure integration screen where you specify data types for downloaded information, a new **Emails** section appears.

In the **Default email address type** field, you select an email address type to assign to email addresses that you download with web transactions.

In addition to the new **Emails** section, the label was updated for the first field in the **Addresses** section. The **Default address type** field label more accurately reflects the fact that this field determines the address type to assign to default addresses that you download with web transactions.

Batch Assignment Settings

On the Web Transactions page, batch assignment settings now allow you to associate more than one batch template with web transaction types. This allows you to set up multiple batch templates to handle transactions of the same type for the different units of your organization, and batches can respect site security based on the template associated with each batch.

On the Batch assignment settings tab, the **Batch template** column under **Batch assignment settings** has been replaced by the **Transaction type** column because the relationship between a batch assignment setting and the transaction type can no longer be inferred from the batch template.

On the Add batch assignment settings screen and the Edit batch assignment settings screen, the **Transaction type** field replaces the **Batch template** field. You must select a transaction type before you can add a batch assignment, and after you add a batch assignment, you can no longer edit the transaction type .

A new **Batch template** column also appears in the **Batch assignments** grid to indicate the batch template associated with batch assignments.

On the Add batch assignment screen and the Edit batch assignment screen, the **Batch template** field now appears so that you can associate batch templates with batch assignments rather than with batch assignment settings. This allows you to add multiple batch assignments with different batch templates to batch assignment settings to respect site security when you download web transactions to batches.

Add batch assignment

Name: [   ]

Transaction filters

Assign by: [Constituent   ▼]

Assign by selection: [🔍 ✎]

Batch owners

Batch template: [▼]

Select owners for batch assignment:

Owner
*

Settings for new records

Default constituent security group: [▼]

Constituent site: [▼]

Default account system: [▼]

Default tribute: [🔍]

Attribute currency: [▼]