

# Administration Guide

03/22/2016 Blackbaud CRM 4.0 Administration US

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# Quick Links



The Administration page includes many tools and features to help you configure the program and manage processes. Several administration tools are addressed in this guide while others are explained elsewhere. Use these links to find the information you need.

Application	<a href="#">Application Features</a>
Attribute categories	<a href="#">Attribute Categories</a>
Audit tables	<a href="#">Security Guide</a>
Batch	<a href="#">Batch and Import Guide</a>
Business processes	<a href="#">Queue Guide</a>
Change password	<a href="#">General Features Guide</a>
Code tables	<a href="#">Code Tables</a>
Configuration Data	<a href="#">Configuration Data</a>
Countries and states	<a href="#">Countries and states</a>
Currency	<a href="#">Multicurrency Guide</a>
Data warehouse	<a href="#">Data Warehouse and OLAP Guide</a>
Data tune-up	<a href="#">Data Tune-Up Guide</a>
Default search lists	<a href="#">General Features Guide</a>
Educational catalog	<a href="#">Educational catalog</a>
Email alerts	<a href="#">Email alerts</a>
Email services	<a href="#">Email services</a>
Enable/disable default blank query criteria	<a href="#">Enable/disable default blank query criteria</a>
Enable/disable general ledger	<a href="#">General Ledger Setup Guide</a>
Enable/disable matching	<a href="#">Enable/disable matching</a>
Enable/disable phone formatting	<a href="#">Enable/disable phone formatting</a>
Exchange integration	<a href="#">Exchange integration Guide</a>
Export definitions	<a href="#">Query and Export Guide</a>
Export	<a href="#">Query and Export Guide</a>

Fiscal year end	<a href="#">General Ledger Setup Guide</a>
Fiscal years	<a href="#">General Ledger Setup Guide</a>
Fundraising Effectiveness Project	<a href="#">Fundraising Guide</a>
Generate application usage report file	<a href="#">Generate application usage report file</a>
General ledger setup	<a href="#">General Ledger Setup Guide</a>
Global changes	<a href="#">Global changes</a>
Global data entry settings	<a href="#">Constituent Duplicates and Merge Tasks Guide</a>
Import Zip code table	<a href="#">Import Zip code table</a>
Import	<a href="#">Batch and Import Guide</a>
Individual display name	<a href="#">Individual display name</a>
Manage web transactions	<a href="#">Web Transactions Guide</a>
Mapping	<a href="#">Mapping</a>
Membership contribution process	<a href="#">Memberships Guide</a>
Notifications	<a href="#">Notifications</a>
Organization calendar	<a href="#">Organization calendar</a>
Organization currency setup	<a href="#">Multicurrency Guide</a>
Organization hierarchy	<a href="#">Organization hierarchy</a>
Organization information	<a href="#">Organization Information</a>
Organizational units	<a href="#">Security Guide</a>
Queue	<a href="#">Queue Guide</a>
Reason codes	<a href="#">Reason codes</a>
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Report model record access security	<a href="#">Report model record access security</a>
Search list configuration	<a href="#">Search list configuration</a>
Security	<a href="#">Security Guide</a>
Self-service password reset	<a href="#">Self-service password reset</a>
Sites	<a href="#">Security Guide</a>
Smart fields	<a href="#">Smart fields</a>
Team approach sync	<a href="#">Team Approach Sync Guide</a>
Time zones	<a href="#">Time zones</a>

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# Configuration Tasks

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There are several tasks you can perform from *Administration*, under **Configuration**.

**Note:** Some configuration tasks are only available to users with certain security rights.



# Countries and States

You can add country and state information to the program and include address block format information. In addition, you can edit and delete any existing country and state information. From the Countries and States page in *Administration*, you can view a list of all country and state entries and the address formats configured for your organization. To access the Countries and States page from *Administration*, click **Countries and states** under **Configuration**.

## Manage Country Information

On the Countries tab, you can view a list of all country entries configured for your organization.

For each country, you can view its abbreviation and address format. You can also view whether a country entry is active and which is the default country entry for your organization. To view the states, provinces, or territories configured for a country, click the name of the country.

## Add Countries

When you add new countries to the program, you can select a default address format and phone format for each country. You can also customize the field labels that appear for address information for a country. Each time you add a new address, the country you select determines how the address components appear, how phone numbers are formatted, and what text appears in the address field labels. For information about how to manage default address formats, see [Add Address Formats for Countries on page 12](#).

### > Add a country entry

1. From *Administration*, click **Countries and states** under **Configuration**. The Countries and States page appears.
2. On the Countries tab, click **Add**. The Add a country screen appears.

**Add a country**

Description:  Address format:

Abbreviation:  Phone format:

ISO 3166 two-letter code:  Phone country code:

Inactive

Address input field labels

Address label:  LOT label:

City label:  County label:

State label:  Congressional district label:

Postcode label:  State house district label:

DPC label:  State senate district label:

CART label:  Local precinct label:

3. In the **Description** field, enter the name of the country. When users enter address information in the program, this name appears in the list of available entries for the **Country** field.
4. In the **Abbreviation** field, enter the abbreviation for the country, such as UK for the United Kingdom or USA for the United States of America.
5. In the **ISO 3166 two-letter code** field, enter the international, standardized two-letter code for the country as set by the International Organization for Standardization (ISO), such as GB for the United Kingdom or US for the United States of America.

**Note:** This field is primarily used with the *Blackbaud Payment Service*. To successfully process credit card information, the *Blackbaud Payment Service* requires the international, standardized two-letter code for the country to be those set by ISO. For more information, see [http://www.iso.org/iso/country\\_codes.html](http://www.iso.org/iso/country_codes.html).

6. To set up the country entry but not allow users to select it, select **Inactive**.
7. In the **Address format** field, select the default address format to use with the country. For information about how to add an address format for a country, see [Add Address Formats for Countries on page 12](#).
8. In the **Phone format** field, select the default phone number format to use with the country. The program uses this selection to automatically format phone numbers that users enter in the program. The phone format does not include country codes. For example, if you select "###-####", when users enter a phone number as "5550199," the program automatically formats this number as "555-0199." To display the phone number exactly as users enter it, select "Unformatted."

**Note:** If a phone number does not include a country code but a user enters a "+" with the other phone number digits, the "+" is removed when the phone number is saved, even when the phone format is set to "Unformatted."

9. In the **Phone country code** field, enter the international country calling code required with phone numbers for the country when called from the default country of your organization. When users enter phone numbers for the country, the program automatically adds the country code as a prefix to the selected phone format.
10. Under **Address input field labels**, enter the captions to appear in the program for address fields for the country. For example, in the **State label** field, enter Province for Canada or Region for the United Kingdom.

**Note:** To validate addresses for the country, you must install the Address Validation Service and configure the web server. For information, see the *Installation and Update Guide*.

11. Click **Save**. You return to the Countries and States page. Unless you select **Inactive**, the new country appears for users the next time they log in.

## Set a Country as Default

You must set a country as the default for your organization. When users enter address information, the program automatically displays the default country and uses the address and phone format selected for the default country. To set a country as the default, select it on the Countries tab on the Countries and States page and click **Mark as default**. You cannot mark an inactive country as the default.

## Manage State Information

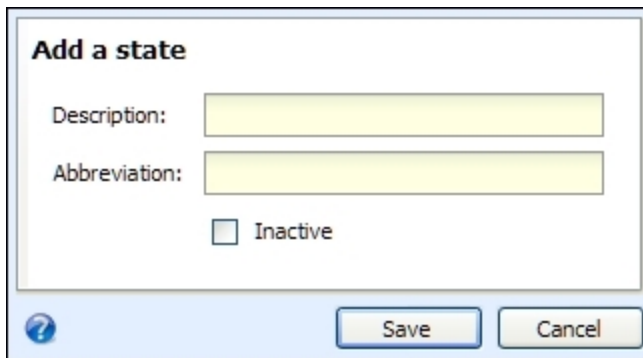
On the States page, you can view the states, provinces, or territories configured for the country and the abbreviation for each. When users enter address information for the country in the program, these states appear as options for the user.

### Add States

When users enter address information in the program, they select the state, province, or territory of the address based on the selected country. You can add states to appear as options for a country. When you add a state, you can include an abbreviation for the state.

#### > Add a state

1. From *Administration*, click **Countries and states** under **Configuration**. The Countries and States page appears.
2. On the Countries tab, select the country for the state and click **Go to state list**. The States page for the country appears.
3. Click **Add**. The Add a state screen appears.



The screenshot shows a dialog box titled "Add a state". It has a light blue header bar with a question mark icon on the left. The main area is white and contains two text input fields. The first is labeled "Description:" and the second is labeled "Abbreviation:". Below these fields is a checkbox labeled "Inactive". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

4. In the **Description** field, enter the name of the state.
5. Enter an abbreviation for the state.
6. To set up the state but not make it available as an option for users, select **Inactive**.
7. Click **Save**. You return to the States page for the country. Unless you select **Inactive**, the new state is available to users the next time they log in.

## Manage International Address Formats

To automatically format addresses you enter in the program, you must assign a default address format for each country. The preferred address format for mailing and communication varies between countries. For example, some countries may require the post code come before the city, while some

may require it to come after the state or province. To view and manage the address formats configured for your organization, select the Address Formats tab.

Under Address formats, you can view the countries for which address formats are configured. To view the format configured for a country, select the country in the grid and click **Show details**. The **Format string** window appears and displays how addresses for the country appear.

Although the program includes the proper address format for many countries, you can add new formats or edit formats as necessary from the grid.

## Add Address Formats for Countries

When you enter an address in the program, the format assigned to the country you select determines how the address components appear on the constituent record, mailings, or any other area that displays address information for the constituent.

### > Add an address format for a country

1. From *Administration*, click **Countries and states** under **Configuration**. The Countries and States page appears.
2. On the Address Formats tab, click **Add**. The Add a country address format screen appears.

**Add a country address format**

Name:

Use the buttons below to insert fields, symbols, lines, and spaces into the address format.

Copy from:

Delete Delete line Clear all

Address Format

Address City State State abbreviation

Postcode Country Country abbreviation

Comma (,) Period (.) Dash (-) Space

Slash (/) Colon (:) New line

Save Cancel

3. Enter a name for the address format.

**Note:** If you enter the name of a country, the program does not automatically associate the format with the country. You select the default address format for each country on the Countries tab. If multiple countries use the same address format, you can associate the format with each country that applies. For information about how to link a country with a default address format, see [Add Countries on page 9](#).

4. To base the address format on an existing format, in the **Copy from** field, select the existing address format.
5. Address format displays the address format selected in the **Copy from** field or the address components and punctuation selected at the bottom of the screen. You can remove components from the format as necessary. To remove the last component of an address line, select the line and click **Delete**. To remove an entire address line, select the line and click **Delete line**. To remove all components from the address format, click **Clear all**.
6. To create or add address components to a format, at the bottom of the screen, click the components and punctuation to appear on the first line of the format. The selected components appear under **Address Format**. For example, if you click **Address**, “[Address]” appears.  
To enter a new address line to the format, click **New line** and select the components and punctuation to use.
7. Click **Save**. You return to the Address Formats tab.

## Enable or Disable Default Blank Query Criteria

The **Include blanks** checkbox appears on query criteria screens for these criteria operators: Not Equal To, Not One Of, Less Than, Less Than or Equal To, Not Between, Not Like, and Does Not Contain. When the **Include blanks** checkbox is selected, the program includes blanks in the query results by adding the “or is blank” filter to the query condition. When the checkbox is cleared, the program excludes blanks from the query results by adding the “and is not blank” filter to the query condition.

**Note:** *Query* treats nulls as blanks. When you include or exclude blank values, this also includes or excludes null values.

The program is set to select **Include blanks** by default. Using **Enable/Disable Default Blank Query Criteria**, you can change this setting. It is important to remember that the enable/disable setting simply determines the default behavior for the **Include blanks** checkbox. You can always select or clear **Include blanks** on the individual criteria screen. This allows you to evaluate and handle queries on a case by case basis. If you later change the Enable/Disable Default Blank Query Criteria setting, it will not affect any queries created prior to the change.

## Enable or Disable Matching

From the Administration page, under **Configuration**, click **Enable/disable matching**. The Edit duplicate record check settings screen appears.

To turn off all constituent duplicate checking in the program, including batches, imports, and manually adding records on the Add Individual or Add Organization screens, clear **Check for duplicates**.

To turn off the automatic updates feature for batches and imports, clear **Auto-match duplicates in batch**.

For more information about matching duplicate constituents, see the *Constituent Duplicates and Merge Tasks Guide*.

## Enable or Disable Phone Formatting

If phone formatting is enabled, the program automatically applies the format you selected for the corresponding country on the Countries and States page. For information about how to assign a default phone format to a country, see [Add Countries on page 9](#).

When you disable phone formatting, you must manually enter phone numbers exactly as you want them to appear in the program. You must also enter phone numbers as you want them to appear for countries assigned "<Unformatted>" as the default phone format.

From the Administration page, under **Configuration**, click **Enable/disable phone formatting**. A verification message appears.

To enable or disable phone formatting, depending on the current configuration setting, click **Yes**. For example, if phone formatting is enabled, click **Yes** to disable formatting.

For information about how to add phone numbers on a constituent record, see the *Constituents Guide*.

### > Enable or disable phone formatting

1. From the Administration page, click **Enable/disable phone formatting** under **Configuration**. A verification message appears.
2. Click **Yes** to enable or disable phone formatting, depending on the current configuration setting. For example, if phone formatting is enabled, click **Yes** to disable formatting.

## Individual Display Name

Individual display name enables you to configure how individual constituent names format throughout the system. When you configure the name format for individual constituents, you set the display name for all your system users. The default individual display name is first name, middle initial, last name. You can select to change the individual display name to any of the existing name formats for individuals.

**Tip:** To review, change, or add individual name formats, see Name Format Options in the Communications Configurations chapter of the *Communications Guide*.

For the individual display name, we recommend the following fields for use in the name format: Last name, First name, Middle name, Maiden name, Title, and Suffix. If you choose one of the following fields, you may notice a decrease in system performance: Nickname, Title 2, Suffix 2, Spouse last name, Spouse first name, Spouse middle name, Spouse nickname, Spouse title, Spouse title 2, Spouse suffix, Spouse Suffix 2, Spouse maiden name, Class year, and Spouse class year.

### > Edit individual display names

1. From *Administration*, click **Individual display name** under **Configuration**. The Individual Display Name page appears.
2. Click **Edit**. The Edit individual display name screen appears.
3. Select the name format to display for all individual constituents in the system.

**Note:** The name format you select here does not interfere with the options you have already set up for mailings and communications.

4. Click **Save**. You return to the Individual Display Name page and the updated information displays in the grid.

## Mapping

To access and use Mapping functionality, you must have the appropriate credentials. When you enable *Mapping*, you can select whether to display maps and distances in miles or kilometers (km). On the Mapping page, you can configure *Mapping* to meet the needs of your organization. To access the Mapping page from *Administration*, click **Mapping** under **Configuration**.

From this page, you can manage the *Mapping* credentials and configure the distance unit to use.

## Edit Mapping Credentials

From *Administration*, you can configure the credentials required to access and use the Mapping functionality.

### > Edit map credentials

1. From *Administration*, click **Mapping** under **Configuration**. The Mapping page appears.
2. Under **Credentials**, click **Edit**. The Edit mapping credentials screen appears.
3. Enter your license key.
4. Click **Save**. You return to the Mapping page. To access the mapping functionality, click **Mapping** under **Tasks**.

## Edit the Map Distance Unit

From *Administration*, you can select whether to display the Mapping functionality in miles or kilometers (km). Your selection determines how distance appears in *Mapping*, such as in the legend or a radius search.

### > Edit the map distance unit

1. From *Administration*, click **Mapping** under **Configuration**. The Mapping page appears.

2. Under **Map distance unit**, click **Edit**. The Edit map distance unit screen appears.
3. Select whether to view maps in miles or kilometers.
4. Click **Save**. You return to the Mapping page.

## Organization Information

One of the initial system configuration tasks you should complete is to enter your organization name and contact information, which includes your address, phone number, and website. After this information is entered, it is displayed in various reports and documents generated by the system. To complete this task, you edit the generic organization information provided with the system.

**Warning:** If you do not enter the specific name and contact information for your organization, the generic information that is provided with the system will be used in applicable reports and documents.

### > Edit organization information

1. From *Administration*, click **organization information** under **Configuration**. The Manage organization Information page appears.
2. Click **Edit**. The Edit organization information screen appears.
3. Enter your organization name as it should appear on reports and documents. Also enter your organization's address, phone number, and website.
4. Click **Save**. You return to the Manage organization Information page and the updated information is displayed in the grid. If your organization name or contact information should change, you should edit this information as needed.

## Reason Codes

With reason codes, your organization can standardize the reasons users change information and restrict the use of records, such as when they mark a constituent as inactive or write off unpaid pledges. When users make the change, they can select this code to consistently explain the reason for the change. On the Reason Codes page, you can view and manage the reason codes your organization uses. To access the Reason Codes page from *Administration*, click **Reason codes** under **Configuration**.

Depending on your system role, multiple tabs may appear on this page so you can manage reason codes by functional area.

**Note:** You can also configure reason codes from the Configuration section of *Constituents*, *Revenue*, and *Memberships*.

### > Constituents

On the Constituents tab, you can view the reason codes your organization uses to designate a



constituent “inactive” and to rollback constituent record changes. By default, all active reason codes display in both the **Mark inactive** and **Constituent data review rollback** grids.

### > Revenue

On the Revenue tab, you can view the reason codes your organization uses to write off pledge balances and installments, change recurring gift statuses, skip recurring gift installments, and adjust revenue that has posted to the general ledger. If your organization enables gift fees, you can also view the reason codes your organization uses to waive gift fees automatically applied to payments. For rejected direct debit transactions you receive from your financial institution, you can select which adjustment code to automatically apply to the corresponding entry in a Direct Debit Return batch file. In the **Adjustment** section, select **Default for direct debit return batch rejections** on the Add a reason code screen. For information about the Direct Debit Return batch rejections, see the *Batch and Import Guide*.

**Note:** On the Revenue tab, under **Recurring gift status change**, any reason code you configure for the “Held” status is available for skipped installments.

For auction import adjustments, you can select which adjustment code to automatically apply as the default. On the Add a reason code screen, select **Default for auction import adjustments**.

### > Receipts

On the Receipts tab, you can view the reason codes your organization uses to designate a re-receipt payment. By default, all active reason codes display under **Re-receipt payments**. To view all reason codes, including those marked “inactive,” click **Filter**, select **Include inactive**, and click **Apply**. For each reason code, you can view its description and whether it is active. To update the information that appears in the grid, click **Refresh List**.

### > Membership

On the Membership tab, you can view the reason codes your organization uses for canceled memberships. When a membership is canceled, you select a reason code. By default, all active reason codes display under **Cancellation**. To view all reason codes, including those marked “inactive,” click **Filter**, select **Include inactive**, and click **Apply**.

On the Membership tab, you can view the reason codes your organization uses for canceled memberships. When a membership is canceled, you select a reason code. By default, all active reason codes display under **Cancellation**.

## Add Reason Codes

With reason codes, your organization can standardize the reasons users make changes to information and records. Before users can select a reason code, you must add it to your database. Reason codes can be up to 10 characters in length.

### > Add a reason code

1. From *Administration*, click **Reason codes** under **Configuration**. The Reason Codes page appears.
2. On the applicable tab, click **Add**. The Add a reason code screen appears.

3. In the **Reason code** field, enter an alphanumeric code to identify the reason for the change. For example, for a change to correct a data entry error, enter ERR.
4. In the **Description** field, enter an explanation of when to select the reason code.
5. Click **Save**. You return to the Reason Codes page.

## Report Model Record Access Security

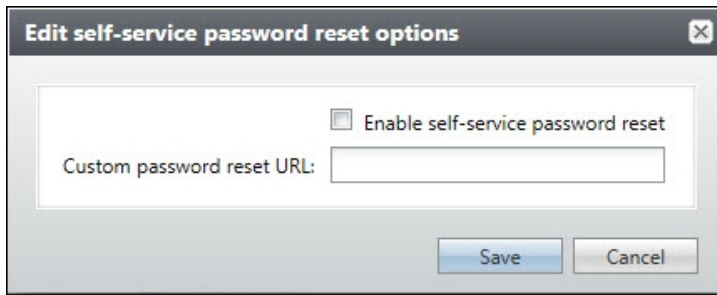
You can configure security for the Report Model Generator to use the same user access rights that exist in the program for records. To use record access security for the Report Model Generator, go to *Administration*, then click **Configure Report Model Record Access Security** under **Configuration**. Select **Use record access security** and click **Save**.

## Self-service Password Reset

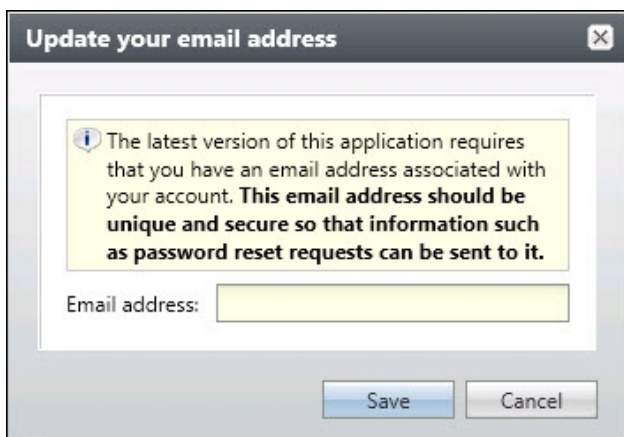
When you host your own Blackbaud application and turn on forms authentication in the `web.config` file, the **Self-service password reset** task appears under **Configuration**. You can configure this task to provide a way for users to change passwords.

**Note:** Forms authentication includes other login enhancements such as invalid login messages to help clarify how to successfully log in to the application. When you host your Blackbaud application, you can edit the `web.config` file to turn this on. For more information, see 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.

When you click **Self-service password reset**, the Edit self-service password reset options screen appears. Select **Enable self-service password reset** so users can change passwords. If you have your own website for users to change passwords, enter the URL for that site in the **Custom password reset URL** field. Otherwise, leave this blank.



When you select **Enable self-service password reset**, 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 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.

To adjust this time, edit the `SelfServicePasswordResetUrlValidHours` key in the `web.config` file.

**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.

## Time Zones

To ensure time is formatted and displayed correctly for time zone-aware areas of the system, select your organization's default time zone. From the Time Zones page in *Administration*, you can view a list of supported times zones and designate one as the default. You can also make time zones inactive or active.

The default time zone setting is especially necessary for organizations with a hosted Blackbaud solution. For example, if your organization is located in the Pacific time zone but our servers hosting the solution are located in the Eastern time zone, you must set the default time zone to "(GMT- 8:00) Pacific Time" so that time zone-aware areas of the application use the correct local time.

The default time zone setting affects the following time-zone aware areas of the program:

- Program event dates and times displayed through advance sales, daily sales, group sales, and online
- On sale date for tickets
- Availability time for discounts and combinations
- Times displayed on sales receipts
- Order information, including the order date and print date
- Times displayed on the Average Hourly Sales Report

**Note:** The **Update time zone daylight savings rules** task is used to refresh and apply daylight savings rules stored in the database. This task is needed only if the government changes the rules for when daylight savings time begins and ends in a particular region. For example, if the date and time that daylight savings begins for the "(GMT-05:00) Eastern Time" region changes, then rules stored in the database will be updated to match the changes. To apply the new rules, you must access *Administration* and click **Update time zone daylight savings rules**. For more information see, [Update Daylight Savings Rules on page 20](#).

### ➤ Select a default time zone for your organization

1. From *Administration*, click **Time zones** under **Configuration**. The Time Zones page appears.
2. In the grid, select the default time zone for your organization and click **Mark as default**. The selected time zone is now the system default and is displayed with a green checkmark.

**Note:** When a time zone is marked the default, the daylight savings rules for that time zone are automatically updated to match the latest rules stored in the database.

### ➤ Mark time zones inactive or active

1. From *Administration*, click **Time zones** under **Configuration**. The Time Zones page appears.
2. In the grid, select a time zone to make inactive and click **Mark inactive**. The time zone is removed from the grid. By default, inactive time zones are not displayed on the Time Zones page. To view inactive times zones, select **Include inactive** and click **Apply**.
3. If needed, you can make the time zone active again. To do so, select **Include inactive** and click **Apply** to display the inactive zone. All inactive zones are now displayed. Select the one to activate and click **Mark active**.

**Note:** When a time zone is marked active, the daylight savings rules for that time zone are automatically updated to match the latest rules stored in the database.

## Update Daylight Savings Rules

The **Update time zone daylight savings rules** task is used to manually refresh and apply daylight savings rules stored in the database to all active time zones. This task is needed only if the government changes the rules for when daylight savings time begins and ends in a particular region. For example, if

the date and time that daylight savings begins for the “(GMT-05:00) Eastern Time” region changes, this task will update the rules stored in the database to match the changes.

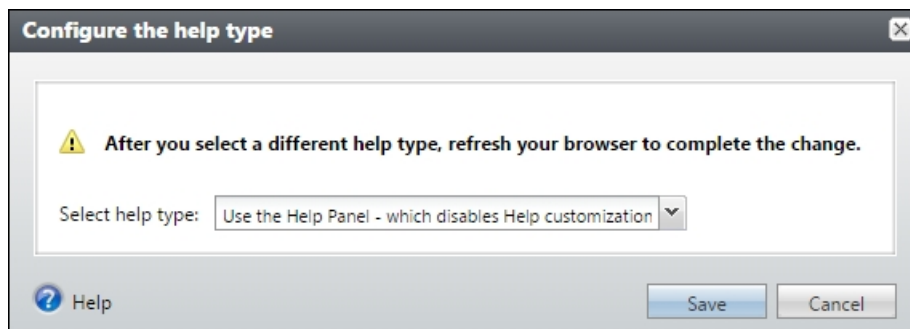
### ➤ Update daylight savings rules

1. From *Administration*, click **Time zones** under **Configuration**. The Time Zones page appears.
2. Under **Tasks**, click **Update time zone daylight savings rules**. The rules stored in the database are applied and updated to all active time zones.

## Configure Help Type

An online Help Panel is available with **Blackbaud CRM 4.0** and higher, and is set as the default type. However, to continue using customized help topics for your organization, you do have the option to revert back to the legacy help topics installed with the program.

From the Administration page, under **Configuration**, click **Configure Help Type**. The Configure the help type screen appears.



In the **Select help type** field, you can choose between the following options:

- **Use the Help Panel - which disables Help customizations** - This option is set as the default help type after you initially install or upgrade. This option allows access to new feature content, the latest help topics from service pack new features and additional content improvements, and feature videos.

A tabbed panel brings online help topics directly into the program. When you click **Help**, a panel appears from the right side of your screen and displays content specific to your page or screen.

- **Use legacy Help - which keeps Help customizations** - This option allows you to continue using customized help topics for your organization. You have access to the legacy help topics installed with the program as well as your customized help topics. The help button appears in the same location as in previous releases. For more information about customizing help topics, see the *Customize Help for the Infinity Platform Guide*.

After you make a new selection and click **Save**, you must refresh your browser and log in again.

**Warning:** It is important to note that you cannot use a combination of both help types. You must select one or the other. Your selection will be the default for future upgrades.

For more information about online help, see [Online Help Panel](#).

# Application Features

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On the Application page, you can high-level administrative tasks to manage the program. For example, you can use the catalog browser to load reports to a new report server. To access the Application page, go to *Administration* and click **Application**. The Application page appears.

## Catalog Browser

System administrators use the catalog browser to manage the installation of custom catalog items and reports. For example, they can load reports to a new report server, if needed. To access the catalog browser, go to *Administration* and click **Application**. On the Application page, click **Catalog browser**. The Catalog Browser page appears.

**Note:** A catalog item is a single specification, while an optional, custom feature may include multiple specifications.

## Catalog Browser Tab

On the Catalog Browser page, the Catalog Browser tab displays catalog items along with information such as descriptions and whether the items are loaded. By default, all new features are loaded through revisions during an installation or upgrade.

To access the Catalog Browser, go to *Administration* and click **Application**. On the Application page, click **Catalog browser**. The Catalog Browser page appears.

On the Catalog Browser tab, use the filter tool to select the catalog items to display. You can filter the catalog items by type, source, and author. To only display items that are not loaded, select **Exclude loaded items**.

#### **Load item**

To load a catalog item, select it in the grid and click **Load item**. To load multiple items, click **Load all catalog items** under **Tasks**. For more information about how to load multiple catalog items, see [Load All Catalog Items on page 23](#).

#### **View xml**

To view the specification for a catalog item in XML format, select it and click **View xml**. The XML appears in a separate window.

## Optional Features Tab

On the Catalog Browser page, the Optional Features tab displays new features by release and indicates whether they are loaded. With the tree view on the tab, you can view the features that are available for different areas of the program.

When you select a folder in the tree view, its features appear in the grid. To only display items that are not loaded, select **Exclude loaded items**.

#### **Load feature**

To load an optional feature to the program, select it in the grid and click **Load feature**.

#### **View xml**

To view the specification for a feature in XML format, select it and click **View xml**. The XML appears in a separate window.

## Catalog Browser Tasks

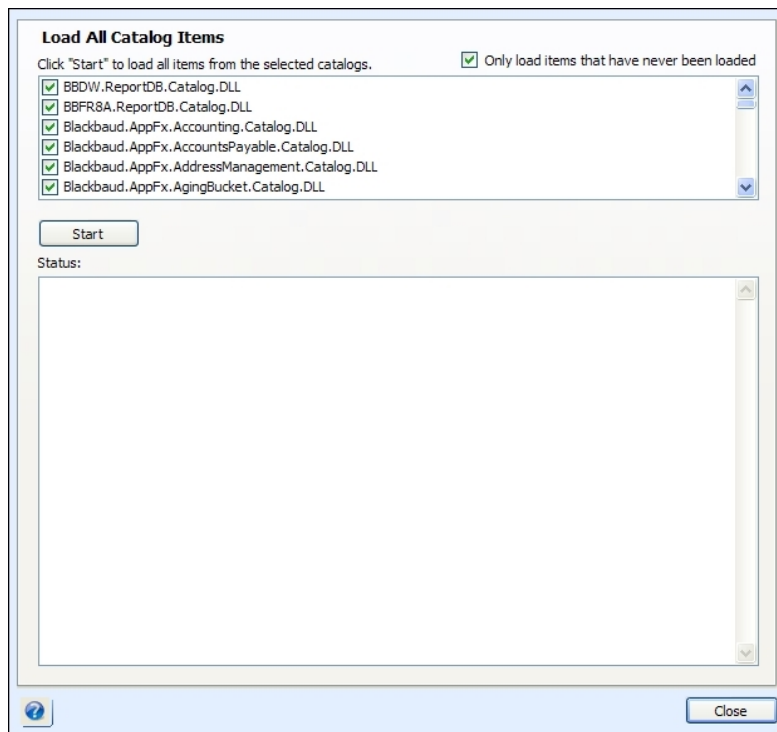
From the Catalog Browser page, you can access these tasks load catalog items, load reports, and refresh shell navigation.

## Load All Catalog Items

To load multiple catalog items, click **Load all catalog items** under **Tasks**.

### > **Load all catalog items**

1. From *Administration*, click **Application**, and on the Application page, click **Catalog browser**. The Catalog Browser page appears.
2. Under **Tasks**, click **Load all catalog items**. The Load All Catalog Items screen appears.



3. By default all items are marked for loading.
  - To load only items that are not already loaded, select **Only load items that have never been loaded**.
  - To exclude certain catalog items, clear the checkboxes for those items.
4. Click **Start**. The **Status** box displays the processing status for each catalog item. Processing may take a few minutes.
5. When processing finishes, click **Close** to return to the Catalog Browser page. To update the grid, click **Refresh List**.

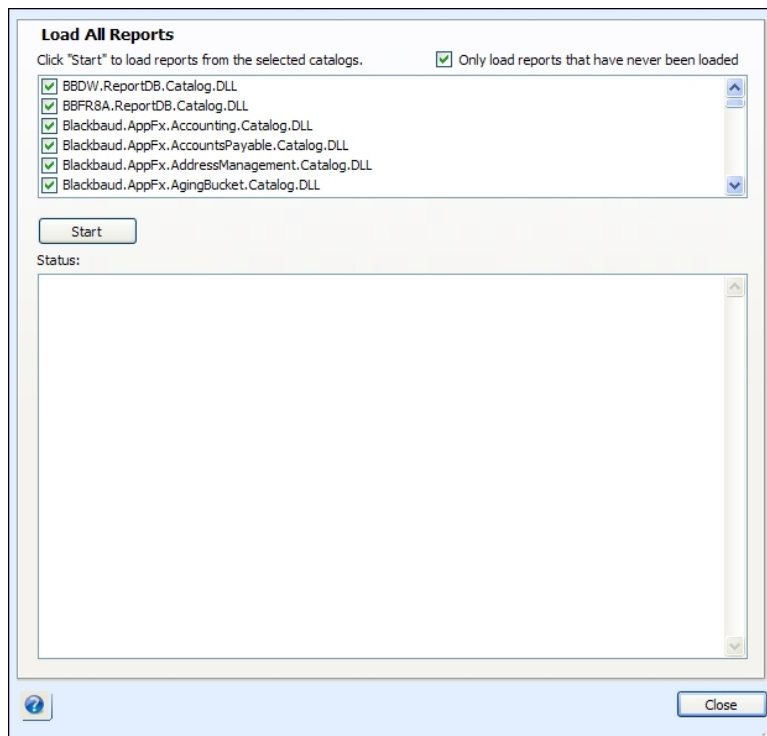
## Load All Reports

To load all report catalog items, click **Load all reports** under **Tasks**.

### > Load all reports

1. From *Administration*, click **Application**, and on the Application page, click **Catalog browser**. The Catalog Browser page appears.
2. Under **Tasks**, click **Load all reports**. The Load All Reports screen appears.





3. By default all report items are marked for loading.
  - To only load reports that are not already loaded, select **Only load reports that have never been loaded**.
  - To exclude certain reports, clear the checkboxes for those items.
4. Click **Start**. The **Status** box displays the processing status for each report catalog item. Processing may take a few minutes.
5. When processing finishes, click **Close** to return to Catalog Browser page. To update the grid, click **Refresh List**.

## Refresh Shell Navigation

After you load catalog items or optional features, click **Refresh shell navigation** under **Tasks** to make the loaded items available in the program.

## Application Features

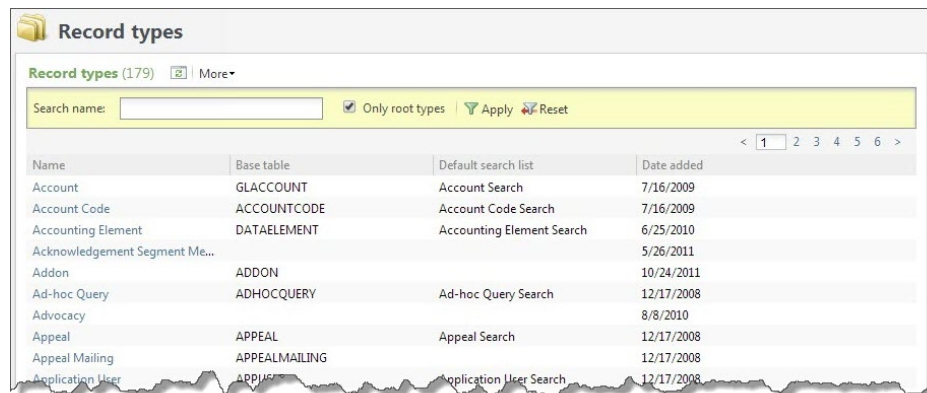
On the Features page, you can search the program for features such as data forms, query views, and KPIs in the same way that you search for constituents, interactions, and other first-class records elsewhere in the program. You can then access the features to view details and access security permissions. This information can be useful for developers who need information about features and where they are used, as well as for administrators who want an in-depth view of features. Under **New Features**, you can also search for features according to when they were added to the program.

To access the Features page, go to *Administration* and click **Application**. On the Application page, click **Features**. The Features page appears.

## Record Types

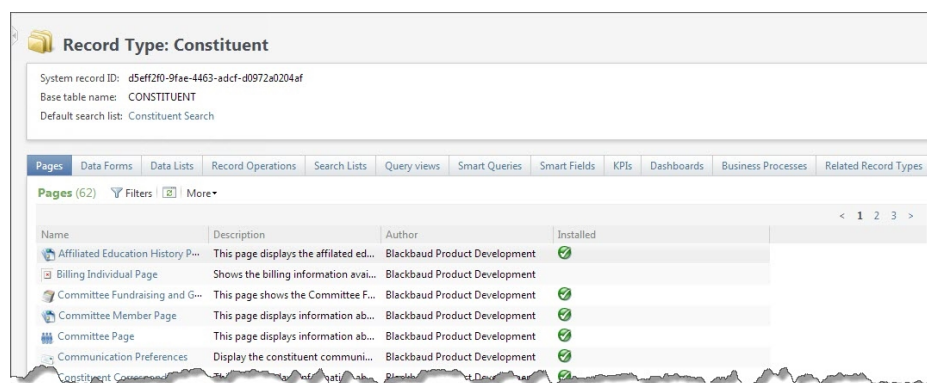
Under **Record Types**, you can access record types to view their scale and scope in the program. You can search for record types, view a list of record types, and filter a list of record types according to the time frame when they were added to the program.

To view a list of record types, click **Record types**.



Name	Base table	Default search list	Date added
Account	GLACCOUNT	Account Search	7/16/2009
Account Code	ACCOUNTCODE	Account Code Search	7/16/2009
Accounting Element	DATAELEMENT	Accounting Element Search	6/25/2010
Acknowledgement Segment Me...			5/26/2011
Addon	ADDON		10/24/2011
Ad-hoc Query	ADHOCQUERY	Ad-hoc Query Search	12/17/2008
Advocacy			8/8/2010
Appeal	APPEAL	Appeal Search	12/17/2008
Appeal Mailing	APPEALMAILING		12/17/2008
Application User	APPLICATIONUSER	Application User Search	12/17/2008

On the Record types page, you can access record type definitions to view details such as the features in the program that require or return records for a record type. For example, you can select the Constituent record type to view the features in the program that require or return records of type "Constituent."



Name	Description	Author	Installed
Affiliated Education History P...	This page displays the affiliated ed...	Blackbaud Product Development	✓
Billing Individual Page	Shows the billing information avai...	Blackbaud Product Development	✓
Committee Fundraising and G...	This page shows the Committee F...	Blackbaud Product Development	✓
Committee Member Page	This page displays information ab...	Blackbaud Product Development	✓
Committee Page	This page displays information ab...	Blackbaud Product Development	✓
Communication Preferences	Display the constituent communi...	Blackbaud Product Development	✓

## Features

Under **Features**, you can search for features such as data forms, query views, and KPIs in the same way that you search for constituents, interactions, and other first-class records elsewhere in the program. To search for an item, click a search task and enter your search criteria. When you select a feature, the program displays details such as ID, record type, implementation information, and whether the feature

is installed. You can also view output fields and filters, as well as the pages and dashboards that use the feature.

**Note:** You can also create ad-hoc queries to view details about many of these features. For example, to identify the data lists that include the most output fields, you can create a Data List query, add **Field ID** to the output fields, apply the COUNT summary, and organize the results in descending order.

For example, to search for a data list, click **Data list search**. On the search screen, enter your search criteria and select a data list. The Data List page appears. On this page, you can view the ID for the list, the record type, implementation information, and whether the data list is installed. You can also view the output fields and filters, as well as the pages and dashboards that use the data list.

**Data List: Ad-Hoc Query List**

System record ID: 6df0b079-ac13-454d-90f6-f75ca75cc61b  
 Description: Returns a list of ad-hoc queries.  
 Author: Blackbaud Product Development  
 Date added: 9/29/2010 1:25:58 AM  
 Date changed: 3/19/2013 8:57:37 AM  
 User defined: No  
 Context record type:  
 Implementation: SP (USP\_DATALIST\_ADHOCQUERY)  
 Security folder: Query\Ad-hoc Query  
 Installed products:  
 Installed:  Yes

Output Fields | Filters | Page References | Dashboard References | API

Output fields (22)  More

Field ID	Caption	Data type	Hidden	Installed products	Installed
ID	ID	Guid	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Name	Name	String			<input checked="" type="checkbox"/>
Description	Description	String			<input checked="" type="checkbox"/>
Record Type ID	Record Type ID	Guid	<input checked="" type="checkbox"/>		

On the details page for a feature, the API tab includes a reference for developers about how to use the feature from a variety of APIs. To set a reference to a BBMetalWeb assembly when you write .NET client-side code, use this tab to see which assembly contains the wrapper for a feature. The tab also includes the BizOp SOAP URL to use to get the data that a feature returns.

Output Fields | Filters | Page References | Dashboard References | API

**Server-side UI Model**

Assembly: Blackbaud.AppFx.Platform.UIModel.dll  
 Class: Blackbaud.AppFx.Platform.UIModel.Query.AdHocQueryListUIModel

**Client-side Web API**

Assembly: Blackbaud.AppFx.Platform.Catalog.WebApiClient.dll  
 Namespace: Blackbaud.AppFx.Platform.Catalog.WebApiClient.DataLists.TopLevel  
 List class: AdHocQueryList  
 Row data class: AdHocQueryListRow  
 Filter class: AdHocQueryListFilterData

**Workflow Activity API**

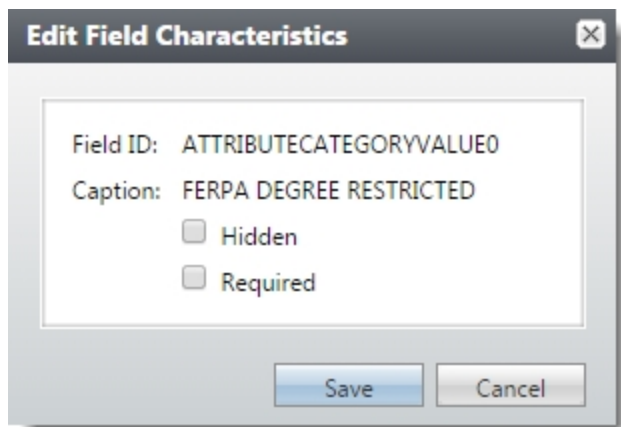
Assembly: Blackbaud.AppFx.Platform.Catalog.Activities.dll  
 Namespace: Blackbaud.AppFx.Platform.Catalog.Activities.DataLists.TopLevel  
 Load activity: AdHocQueryListLoad  
 Filter assign values activity: AdHocQueryListFilterAssignValues

## Fields and Field Characteristics

When you edit a data form, you can make changes to the fields on the form from the Fields and the Field Characteristics tabs on the data form record.

To search for a data form, from the Features page, click **Data form search** under **Features**.

Once you access the data form you want to edit, you can make selections about fields on the form. On the Field Characteristics tab, you can edit a field to hide it or make it required or not required. From the field you want to edit, click **Edit**. The Edit Field Characteristics screen appears.



On this screen, you can select whether you want to hide the field or make it required and save your preferences.

**Note:** While you can uncheck the **Required** checkbox to make fields optional, sometimes the business logic of a particular form that uses that field can override your selection, so that certain fields remain required in certain forms even when you do not make them required on this screen. If you hide a required field, when users try to save the form they receive an error indicating they failed to complete a required field.

## New Features

Under **New Features**, you can use the filter fields to search for features such as data forms, query views, and KPIs according to when they were added to the program. When you select a feature, the program displays details about the feature.

For example, to view new record operations, click **New record operations**. The Record operations page appears. In the **Show** field, select a time frame to filter the record operations and click **Apply**.

**Record operations**

New record operations (1,574) [More](#)

Show: All Record type:  Include all products

Name	Description	Author	Record type	Date added	Installed
Sponsorship Sales Order Record O...	Completes a sponsorship order th...	Blackbaud Product Development	Sales Order	4/15/2014	Yes
Communication Effort Seed Delet...	Deletes a seed from a marketing e...	Blackbaud Product Development	Marketing Effort Seed	4/10/2014	Yes
Communication Effort KPI Delete...	Deletes a KPI from a marketing eff...	Blackbaud Product Development	KPI Instance	4/10/2014	Yes
Reschedule Tickets Increase Event...	Increases the capacity for the event...	Blackbaud Product Development	Event	4/10/2014	Yes
Event Uses Program Registration L...	Remove the event's registration in...	Blackbaud Product Development	Event	4/10/2014	Yes
Event Custom Registration Inform...	Create a copy of the program's re...	Blackbaud Product Development	Event	4/10/2014	Yes
Program Registration Information...	Delete a Registration Information I...	Blackbaud Product Development	Program or Event Registration Inf...	4/10/2014	Yes
Registration Information: Mark In...	Mark a registration information re...	Blackbaud Product Development	Registration Information	4/10/2014	Yes
Registration Information: Mark Ac...	Mark a registration information re...	Blackbaud Product Development	Registration Information	4/10/2014	Yes
Registration Information: Delete	Delete a registration informati...	Blackbaud Product Development	Registration Information	4/10/2014	Yes

# Attribute Categories

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Data Types .....	32
Create Code Tables .....	33
<b>Manage Attribute Form Extensions</b> .....	<b>34</b>
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Attributes provide flexibility to your record keeping. With attributes, you can define and store special information about a wide variety of record types. You can identify a category for the attribute and then store an entry specific to that category.

From *Administration*, you create the attribute categories available to users in the program. Users can assign any necessary values to these categories. For example, if a constituent is a gourmet cook and a cyclist, a user can enter each activity in the constituent’s record with an attribute category of Hobbies. This helps keep attributes neatly organized and helps with reports and queries.

To enable users to enter attributes when they add or edit information throughout the program, you can use form extensions. With form extensions, you can add a tab or section for users to enter attribute information on applicable forms and pages that otherwise do not include fields for attributes.

To view and manage the attributes available to users, go to *Administration* and click **Attribute categories**. The Attribute Categories page appears.

## Manage Attribute Categories

On the Attribute categories tab, you can view the categories available to users. For each category, you can view its name, record type, and data type.

From the grid, you can add and manage categories as needed.

## Add Attribute Categories

To help better manage the attributes your organization uses, you can add attribute categories. You can use these categories to store information. For example, to track seating preferences for an event, you can create a Seating Preference attribute category so users know where to find this information on constituent records.

You can assign attributes to a category and then assign the category to a group. For example, you can create a Hobbies attribute category and assign the category to constituent records. The next time you open a constituent record and want to record the fact that this constituent's favorite hobby is golf, "Hobbies" appears as an option in the **Category** field of the constituent attribute screen accessed from the Attributes tab. Under **Code tables** in *Administration*, you can also create an attribute group called Outside Interests. In this group, you might have categories for hobbies and for arts.

### > Add an attribute category

1. From *Administration*, click **Attribute categories**. The Attribute Categories page appears. Any existing attribute categories appear on this page.
2. On the Attribute categories tab, click **Add**. The Add attribute category screen appears.

The screenshot shows a form for adding an attribute category. It includes the following fields and options:

- Name:** A text input field.
- Record type:** A dropdown menu.
- Attribute group:** A dropdown menu.
- Data type:** A dropdown menu with "Text" selected.
- Code table:** A dropdown menu with a plus icon to the right.
- Allow only one per record
- Make available in lists

3. Enter a unique name to help identify the category. The name appears in the **Category** field drop-down menu when you add or edit attribute information on a record. If no attribute categories exist for a record type, the Attributes tab does not appear.
4. In the **Record type** field, select a record type for the attribute. For example, to use the attribute to track the interests of constituents, select "Constituent." This attribute appears as an option for constituent records only.
5. To assign the attribute to a group, select the attribute group code table in the **Attribute group** field. For example, you can create an attribute group called Outside Interests that includes attribute categories of Athletics and Arts. You add and manage attribute groups as code tables in *Administration*.
6. In the **Data type** field, select the type of data for users to provide in the attribute category. For example, to allow users to enter text to describe constituent interests, select "Text." For a detailed explanation of the available data types, see [Data Types on page 32](#).

- If you select "Code table," users select attribute values from a defined list. In the **Code table** field, select the code table for users to select from. To create a code table, see [Create Code Tables on page 33](#).
  - If you select "Constituent record," users can search for and select constituents as the attribute values. In the **Search list** field, select a search screen for users to find constituents. For example, to allow users to select individual constituents only, select "Individual Search." Once you add the attribute category, you can change which search list is used.
7. To limit the category to one per record, select **Allow only one per record**.

**Note:** To include the attribute category on form extensions, you must select **Allow only one per record**. Form extensions allow users to enter attribute information throughout the program. For more information, see [Manage Attribute Form Extensions on page 34](#).

8. To make the category available as a list column, select **Make available in lists**. After the program executes a nightly business process which adds the categories and attribute values to lists, the category appears as an option when you click **Columns** from list pages.

**Note:** For Friends Asking Friends lists and reports that refresh data from the Data Warehouse, the program also executes a business process to refresh the data after the process to add the categories is complete.

**Tip:** We recommend you only select categories you need for lists. If you include a large number, the categories will slow list performance.

9. Click **Save**. You return to the Attribute Categories page.

**Note:** If you add a query view after you create an attribute category, the program does not automatically add the attribute category to the new query view. For information about how to add an attribute category to a query view, see [Update Attribute Query Relationship on page 36](#).

## Data Types

Data types determine the values that users can enter when they add attributes. When users add attributes, they select attribute categories in the **Category** field. The data types you select for the attribute categories determine the type of data that the users can enter in the **Value** field. For example, if you create an attribute category for constituent records and select "Currency" as the data type, users who add attributes and select this attribute category can enter only monetary values.

Data Type	Allows
Text	Letters, numerals, and nonalphanumeric characters such as "!", "@," and "#."
Number	Numerals. If users enter anything else, including decimals, an error message appears.
Date	Complete dates in the correct format. Users can select dates from a calendar.



Data Type	Allows
Currency	Numerals and decimals. Automatically formats the monetary values to includes symbols such as dollar signs or pound signs.
Yes/No	"Yes" or "No."
Code table	Code table entries. You select a code table with this data type, and users select from the code table's entries when they add attributes.
Constituent record	Constituent names. You select a search screen with this data type to allow users to search for constituents. The search screen restricts the types of constituents that users can select. Once you add the attribute category, you can change which search list is used.
Fuzzy date	Partial dates such as a year or a month and year. Partial dates must use an abbreviated version of the date format. For example, if the date format is "mm/dd/yyyy," users must enter a fuzzy date such as January 2011 as "1/2011," not "January 2011." Users also can select dates from a calendar.
Time	Time entries, such as 2:00 p.m. or 1:15 a.m.
Memo	Letters, numerals, and nonalphanumeric characters such as "!", "@," and "#." The field expands for this data type.

## Create Code Tables

When you create an attribute category and select "Code table" as the data type, you must select a code table to use as the source of the attribute. If a code table with the desired attributes does not exist in the program, you can create a code table from the Add attribute category screen.

### > Create a code table

1. On the Add attribute category screen, select "Code table" in the **Data type** field. The program enables the **Code table** field.
2. In the **Code table** field, click **New**. The Add a code table screen appears.
3. In the **Name** field, enter a name for the code table in the program. This is the name that appears on the Code Tables page in *Administration*.
4. In the **DB table name** field, enter a name for the code table in the database schema. This is the name you use to reference the code table in SQL.

**Note:** The database table name can be up to 30 characters. It can start with a capital letter from "A" to "Z," followed by one or more uppercase letters or numerals and ending with "CODE." To designate the table as a code table, it must end with "CODE." For example, the database table name for the Alias Type code table in the program is ALIASTYPECODE.

5. In the **Category** field, select a category for the code table. The Code Tables page in *Administration* organizes code tables by category for easier viewing. If the category does not exist, click **Add a code table category** and you can create the new category.

6. In the **Sort type** field, select how to organize the entries in the code table.
7. In the **Description** field, enter a description of the code table.
8. Click **Save**. You return to the Add attribute category screen.

## Manage Attribute Form Extensions

To create tabs or sections for users to enter attributes, you can add form extensions throughout the program. Form extensions add tabs or sections to forms and pages that do not otherwise include attribute fields. On the Attribute form extensions tab, you can create and manage the form extensions for your organization.

### Add Attribute Form Extensions

After you create attribute categories, you can use form extensions to create tabs or sections in related areas of the program. This allows users to enter attribute information on forms and pages that otherwise do not include attribute fields. For example, you can create attribute categories for constituent records and add a form extension to the Individual, Spouse, Business Add Form. When users add constituents, they can then enter attributes on the tab or section you create with the form extension.

When you create a form extension, you select the form or page to modify; select whether to create a tab or section; enter a label for the tab or section; and select the attribute categories to include.

**Note:** To include an attribute category on a tab or section that you create with a form extension, the attribute category must limit attributes to one per record. When you create an attribute category, you must select **Allow only one per record**. For information about how to create attribute categories, see [Add Attribute Categories on page 31](#).

#### > Add an attribute form extension

1. From *Administration*, click **Attribute categories**. The Attribute Categories page appears.
2. On the Attribute form extensions tab, click **Add**. The Add attribute form extension screen appears.

**Add attribute form extension**

Data form: Individual, Spouse, Business Add Form

Render style: Tab

Tab caption: Miscellaneous

Name	Required
Number	
Status	

Name	Required
Interests	<input type="checkbox"/>
Join Date	<input type="checkbox"/>

Save Cancel

- In the **Data form** field, click the binoculars to search for a form or page to modify. A search screen appears. You can search name, record type, and whether the form is in Add, Edit, or View mode.
- In the **Render style** field, select whether to create a tab or section.
  - If you select "Tab," the program adds a tab to the right of any existing tabs. In the **Tab caption** field, enter a label for the new tab.
  - If you select "After parent," the program adds a section below the existing content. If the form or page includes tabs, the section appears on the first tab. In the **Group caption** field, enter a label for the new section.
- Under **Name**, select the attribute categories to include on the form extension and click the right arrow. Attribute categories only appear under **Name** when their record type matches the record type of the form or page you select in the **Data form** field.

**Note:** Form extensions require attribute categories to limit attributes to one per record. If an attribute category allows multiple attributes per record, it does not appear under **Name**. When you create attribute categories, you must select **Allow only one per record**.

- To require users to enter an attribute, select the **Required** checkbox for the attribute category.
- If you include multiple attribute categories, use the up and down arrows to arrange the order.
- Click **Save**. You return to the Attribute Categories page. The program creates the tab or section that allows users to enter attribute information on the form or page you select.

**Note:** To disable a form extension, select it and click **Disable**. For more information, see [Disable or Enable Attribute Form Extensions on page 36](#).

## Disable or Enable Attribute Form Extensions

After you add an attribute form extension, you can enable or disable it as necessary. For example, you may disable a form extension if your organization temporarily stops its use. On the Attribute form extensions tab of the Attribute Categories page, the **Enabled** column displays whether a form extension is enabled.

When you disable a form extension, the program removes the tab from the form or page but retains its configuration for later use. To disable a form extension, select it on the Attribute form extensions tab and click **Disable**.

To resume use of an attribute form extension, you can enable it when necessary. When you enable a form extension, the program adds the tab to the applicable form or page so users can add attribute information as necessary. To enable a form extension, select it on the Attribute form extensions tab and click **Enable**.

## Delete Attribute Form Extensions

After you add an attribute form extension, you can delete it as necessary. When you delete a form extension, the program removes the tab or section from its form or page and deletes the configuration from the database.

**Tip:** Rather than delete an attribute form extension, you can disable it. When you disable a form extension, the program removes the tab or section from the form or page but retains the configuration for later use. For information about how to disable a form extension, see [Disable or Enable Attribute Form Extensions on page 36](#).

## Update Attribute Query Relationship

If you add a query view after you create an attribute category, the program does not automatically add the attribute category to the query view. To add the attribute category to the query view, go to the Attribute Categories page and click **Update attribute query relationship** under **Tasks**.

# Notifications



<b>Add Notifications to a Group of Records</b> .....	<b>37</b>
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Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

Notifications appear on the information bar of a record.

Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when a record is accessed. The notification screen appears the first time a record is accessed during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a specific record from the Documentation tab of the record.

## Add Notifications to a Group of Records

You can create notifications for groups of records in *Administration*. You determine whether all users should receive the notification or only a targeted group of users.

### > Add a notification to a group of records

1. From *Administration*, click **Manage notifications** under **Configuration**. The Notifications page appears.
2. Click **Add**. The Add notification screen appears.

3. In the **Message** field, enter the name of the notification (such as “Board Member Alert”) as well the message or text to display in the actual notification.
4. If this notification will expire or is temporary, in the **End date** field, select a date after which the notification expires.
5. To display the notification in a separate window in addition to the information bar, select **Display in notification window**.
6. Under **Notification records**, select the record type and a selection of records to use. The notification displays for records included in the selection.
7. Under **Notification users**, select whether this notification displays for all users or only selected users. If you select “Selected users,” choose the selection of users to receive the notification.
8. Click **Save**. You return to the Notifications page. The notification is available for the users you selected when they access the records you selected.

## Update Notification Query Relationships

If through a customization process, you add a new query view after a notification is created, the new query view does not automatically add the notification. To add the notification to the new query view, click **Update notification query relationship**.

# Configuration Data

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We recommend you safely configure your system settings in a test environment before you apply them to your live environment. From *Administration*, you can work with configuration data to export and import your configuration settings, such as batch designs and workflows, code tables, and queries, between a test environment and your live database.

## Configuration Export

On the Configuration Export page, you can create and manage processes to export configuration data from your live database. To access the Configuration Export page from *Administration*, click **Configuration data** and then **Configuration export**.

Under **Configuration exports**, the names and descriptions of your configuration export processes appear. From the grid, you can manage your configuration export processes.

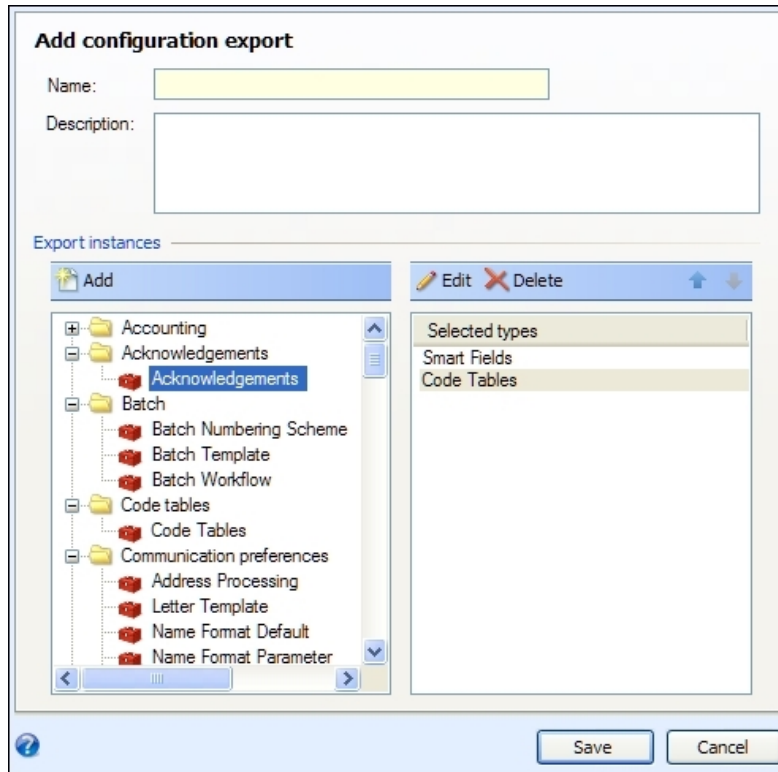
## Add Configuration Export Processes

To export configuration data, you must first create an export process for the data. When you create an export process for configuration data, you enter a name and description to help identify the process and select the types of data to export.

### > Add a process to export configuration data

1. From *Administration*, click **Configuration data** and then **Configuration export**. The Configuration Export page appears.

- Under **Configuration exports**, click **Add**. The Add configuration export screen appears.



- Enter a unique name and description to help identify the export process.
- Under **Export instances**, add the types of configuration data to export.
 

To select a type of configuration data, in the box on the left, select a type of data to export and click **Add**. Under **Selected types**, the export instance for the selected data type appears.

For some configuration data such as smart fields and queries, enter the parameters required for the export instance. For information about how to add an export instance, see [Add Export Instances on page 41](#).
- After you add all configuration data types to export, arrange the order in which to export the instances. The process exports the instances in the order in which they appear under **Selected types**. To adjust the order in which an instance exports, select it under **Selected types** and click the up or down arrow to change its position in the process.
 

For some configuration data such as smart fields and queries, you can edit its parameters as necessary. To edit the parameters of an export instance, select it under **Selected types** and click **Edit**.

To remove an instance from the export process, select it under **Selected types** and click **Delete**.
- Click **Save**. You return to the Configuration Exports page. Under **Configuration exports**, the new export process appears.



## Add Export Instances

When you add or edit a configuration export process, you select the types of configuration data to export. Some instances of configuration data, such as smart fields and queries, require parameters to determine the data to export.

When you add an instance that requires additional parameters to a configuration export process, the Add export instance screen appears. On this screen, select the parameters necessary for the selected instance. For example, to include smart fields in a configuration export process, select whether to export all smart fields or only selected smart fields. To export a query, select the selection of queries to export.

## Run a Configuration Export Process

To export configuration data, you must first run its export process. When you run the process, the program retrieves the selected configuration data types to create an export data file. After the process completes, you can download the data file from the status page of the export process.

To run an export process, select it under **Configuration exports** on the Configuration Export page and click **Export data**. The program runs the process and displays the status page of the process so you can track the status of the process and download the data file upon completion.

For information about the items on the status page, see [Configuration Export Process Status Page on page 42](#).

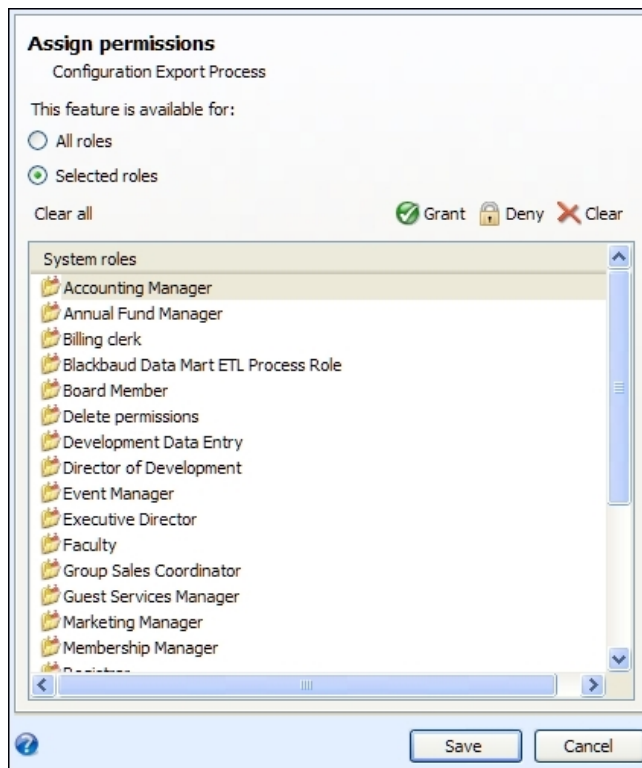
**Note:** You can also run a configuration export process from its status page. Select **Tasks, Start process** from the menu bar, or click **Start process** under **Tasks**.

## Assign Permissions for a Configuration Export Process

After you add an export process, you can assign permissions to the roles who can use the process. When you assign permissions for the process, you can select to allow all roles to use the process or only select roles.

### > Assign permissions for a configuration export process

1. From *Administration*, click **Configuration data** and then **Configuration export**. The Configuration Export page appears.
2. Under **Configuration exports**, select the process to assign permissions for.
3. Click **Assign permissions**. The Assign permissions screen appears.



4. Select whether all roles or only selected roles may access the export process.
  - If you select **Selected roles**, select the permissions for the roles in the **System roles** box.
    - To grant a role access, select it in the box and click **Grant**.
    - To deny a role access, select it in the box and click **Deny**.
    - To remove an existing permission assignment from a role, select it in the box and click **Clear**.
5. Click **Save**. You return to the Configuration Exports page.

## Configuration Export Process Status Page

When you add a configuration export process, the program automatically generates a status page of the process. On the status page, you can view the name and description of the process. To access a configuration export process status page, select the process in the **Configuration exports** grid on the Configuration Exports page and click **Go to process**.

The status page also displays the current status and historical information about the process. To help you navigate through this information, each process status page contains multiple tabs.

Depending on your system role, you can perform tasks to manage a process from its status page. To perform a task, select it from the **Tasks** menu, or click it under **Tasks**.

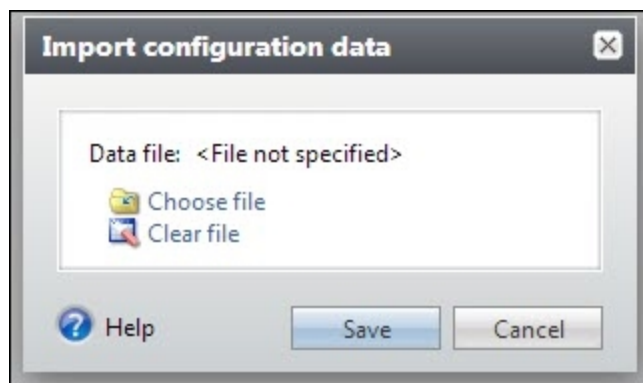
# Configuration Import

You can import an extensible markup language (\*.xml) data file of configuration data into your live database, such as after you configure system settings in a test environment.

## > Import configuration data into the database

1. From *Administration*, click **Configuration data** and then **Configuration import**. The Import configuration data screen appears.

**Note:** To import configuration data from the status page of the import process, click **Start process** under **Tasks**.



2. Browse to and select the \*.xml data file to import.
3. Click **Save**. The program imports the selected data file and displays the status page of the configuration import process so you can track its status.

For information about the items on the status page, see [Configuration Import Process Status Page on page 43](#)

## Configuration Import Process Status Page

When you import a configuration data file, the program automatically displays a status page of the configuration import process. On the status page, you can view the file name of the imported data file.

The status page also displays the current status and historical information about the process. To help you navigate through this information, each process status page contains multiple tabs.

Depending on your system role, you can perform tasks to manage a process from its status page. To perform a task, select it from the **Tasks** menu, or click it under **Tasks**.

## Import or Export Accounting Configuration Data

When you run a process to import or export Accounting configuration data (located under the **Accounting** folder), you can import or export each item separately or together in one file. However, you must import or export the data in the following order:

- Account Systems (if multiple account systems are used)
- Composite Segment Definition (if composite segments are used)
- Account Structure
- Segment Values
- Accounts
- Account Code Mapping
- Segment Mapping
- Composite Segment Mapping (if composite segments are used)

When you import or export Accounting data, also consider the following:

- You can import Account Code Mapping, Segment Mapping, and Composite Segment Mapping in any order, but you must import them after Accounts.
- We recommend you import Segment Values before you import Accounts. If you import Accounts before Segment Values, the program does not import the mappings for Accounts.
- You can import Fiscal Years at any time.

# Application Usage Report



With the application usage report, you can monitor overall system usage and tallies. The report includes counts for how many records of different types are in the system, along with information about how many system roles and users there are. The report also includes information about any custom catalog components that have been added.

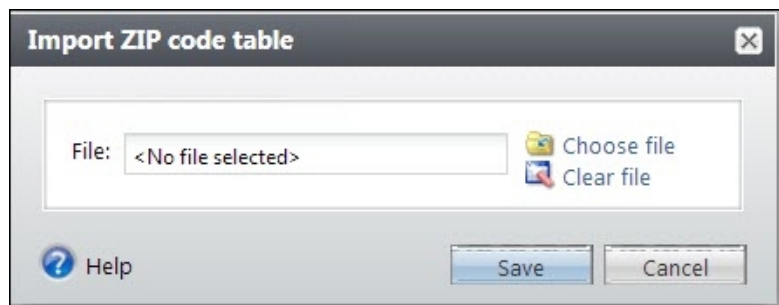
To view the report, in *Administration*, click **Generate application usage report file** under **Tools**. Then click **Start process** under **Tasks**. Select a date and the report is processed. You can click **View report**.

# Import ZIP Code Table

To use the Zip code lookup feature in the program, a system administrator must first import Zip code table entries in .csv format. The spreadsheet must contain the following header information in this order: Zip code, city, state, country. In the **State** column, use the abbreviated form of the state's name, for example, "SC" for "South Carolina". For entries in the **Country** column, use the country's name, not the abbreviation. For example, enter "United States" rather than "US." After you import Zip codes for a country, when you select the country on screens that contain address information, you can search for the code that matches the city and state entered.

## > Import Zip code table entries

1. From *Administration*, click **Import Zip code table** under **Tools**. The Import Zip code table screen appears.



2. In the **File** field, click the folder to browse to the directory where you store the .csv file.
3. Click **Save**. You return to *Administration*. You can now use the Zip code lookup feature.

# Email Management

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From *Administration*, your organization can configure and manage the delivery of email messages to its constituents and application users.

## Email Services

From *Administration*, you can manage the processes used to send email through the program such as for communications and notifications. From the Email Services page, you can configure the connection to the Shared Services server, hosted by Blackbaud, used to send email messages through the program. You can also prioritize the order in which the program submits general purpose email jobs for messages such as email blasts and newsletters to the server. You can use key performance indicators (KPIs) to determine the health and duration of your email processes.

## Configure Email Service Settings

To send email messages through the program, you must first configure the connection to the Shared Services server hosted by Blackbaud. You can also prioritize the order in which the program sends each type of general purpose email job to the server. From the Email Services Configuration page, you can configure these settings. To access this page from the Email Services page, click **Email service settings** under **Configuration**.

To send email messages through the program, you must configure the connection to the Shared Services server hosted by Blackbaud. Under **Connection health**, you can view whether the program can connect to this server. Under **Email services external server settings**, you can view the network address and credentials used to connect to the server. For information about how to edit this information, see [Edit the External Server Settings on page 48](#).

When you run a general purpose email process, the program submits jobs for email messages such as newsletters, blasts, and notifications to the Shared Services server. Under **Email category processing order**, you can view the order in which the program submits each type of email message. You can prioritize each category as necessary. For example, to submit email blasts before newsletters, you can give email blasts a higher priority. To adjust the priority of an email category, select it in the grid and click the up or down arrow.

## Edit the External Server Settings

To send email messages through the program, you must first configure the connection to the Shared Services server hosted by Blackbaud.



**Warning:** If you do not configure the connection to the Shared Services server, or if you enter the incorrect credentials for the server, the program automatically disables all email job processes.

### > Configure the email services server

1. From *Administration*, click **Email services** under **Configuration**. The Email Services page appears.
2. Under **Configuration**, click **Email service settings**. The Email Services Configuration page appears.
3. Under **Email services external server settings**, click **Edit**. The settings screen appears.

4. In the **Host URL** field, enter the network address for the Shared Services server.
5. In the **User name** field, enter the user name your organization uses to connect to the server.
6. In the **Password** and **Confirm Password** fields, enter the password used to connect to the server.
7. To use Secure Sockets Layer (SSL) to connect to the server, select **Use SSL**.
8. Click **Save**. The program verifies and saves the connection information. You return to the Email Services Configuration page.

## Manage Email Services

On the Email Services page, you can manage the processes used to generate and send email messages, the status of email processes and their jobs, and any invalid email addresses encountered by the processes. To access the Email Services page, from *Administration*, click **Email services** under **Configuration**.

To help you navigate through this information, the Email Services page contains multiple tabs.

## Email Processes

On the Email Processes tab of the Email Services page, you can view and manage the processes used to generate and send email messages through the program. You can manage multiple email processes.

- The email status process updates the status of an email job or invalid email addresses list based on information received from the Shared Services server.
- The general purpose process generates email messages for general communications such as newsletters, blasts, and notifications.
- The transactional process generates email messages for communications based on revenue transactions such as revenue acknowledgements and receipts.

Under **Scheduled email processing**, you can view whether a schedule is enabled for the email processes.

Under **Email processing jobs**, the processes used for email messages appear. For each process, you can view the date and status of its most recent instance, the dates the process most recently started and stopped, and any message about its status. You can enable or disable an email process as necessary.

To view additional information about a process, click its row under **Email processing jobs**. Beneath the row, information about the most recent instance of the process appears.

When an email process runs, the program generates a record of the instance of the process. To view the Job History page of a process, click its name under **Email processing jobs**. For information about the Job History page, see [Email Process History on page 51](#).

From the Email Processes tab, you can manage the email processes as necessary.

## Disable an Email Process

From the Email Services page, you can quickly disable an email process, such as to help troubleshoot problems with email jobs. On the Email Processes tab, select the email process under **Email processing jobs** and click **Disable**. When the confirmation message appears, click **Yes**.

## Enable an Email Process

From the Email Services page, you can quickly enable an email process, such as if you previously disabled it. On the Email Processes tab, select the email process under **Email processing jobs** and click **Enable**. When the confirmation message appears, click **Yes**.

**Warning:** If you enable either the transactional or general purpose email job process, we strongly recommend you also enable the email status job process to help track its status.

## Run an Email Process

To generate email messages, you can run an email processing job to submit the messages to the Shared Services server hosted by Blackbaud. You can run separate job processes for general purpose

email messages such as newsletters and transactional email messages such as revenue acknowledgements. You can also run a process to update the status of general purpose and transactional email jobs and any invalid email recipients. On the Email Services page, select the process to run on the Email Processes tab and click **Run email process**.

## Reset the Last Run On Date for an Email Process

To undo the most recent instance of an email process, you can reset its last run on date. When you reset the last run on date, the program resets the sent status of any email messages generated by the process during the most recent instance. On the Email Services page, select the process to reset on the Email Processes tab and click **Reset last run on date**. When the confirmation message appears, click **Yes**.

## Email Process History

When an email process runs, the program generates a record of the instance of the process. On the Job History page of a process, you can view the records of the process instances.

To access the Job History page of a process, click the name of the process on the Email Processes tab of the Email Services page.

Under **Scheduled Job History**, select the status of the instances to view, such as Completed or Did not finish, and click **Apply**. The previously run instances of the process with the selected status appear. For each instance, you can view its status, run date and time details, and the number of records included in the process. To remove the filter and view all instances regardless of status, click **Reset**.

You can delete the record of an instance if necessary. To delete a record of an instance, select the instance under **Scheduled Job History** and click **Delete**.

## Email Jobs

To view and manage previously run email processes, select the Email Jobs tab on the Email Services page.

Under **Email status processing**, you can view the date and time of the most recent instance of the Email status process, such as to verify the process is up-to-date. To run the Email Status Poll process, click **Get latest status**.

Under **Email jobs**, you can view the general purpose email processes and transactional email processes. For each process, you can view its status, the number of retries, the number of messages requested and sent, and its date and time.

To view additional information about a process, select its row under **Email jobs**. Beneath the row, information about the process, such as the subject of the email, its sent from email address and display name, and field name, appear.

To view detail information about an email process on its own page, click its name under **Email jobs**. The Email Job Details page appears.

To help reduce the number of processes in the grid, filter the grid by process type or status. Select the criteria of the process to view, and click **Apply**. To remove the filters and display all processes, click **Reset**.

To use additional criteria to search for an email job, such as by description and email subject, click **Search jobs** to search for the email job and view its Email Job Details page.

From the grid, you can delete a general purpose email process job that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the content, you can delete the job from the server.

## Email Process Job Details

On the Email Jobs tab of the Email Services page, you can view information about general purpose email process and transactional email process jobs. To view additional detail about a process job, access its Email Job Details page. On this page, you can view the subject of the email, its sent from email address and display name, and field name information.

To access this page from the Email Jobs tab on the Email Services page, search for the email job, or click the name of the job under **Email jobs**.

For a general purpose email process, you can delete a job that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the newsletter content, you can delete the process from the server. For information about how to delete an email process, see [Delete a Submitted General Purpose Email Process Job on page 52](#).

To return to the Email Services page, click **Go back to Email Services** under **Email Services**.

## Search Email Jobs

On the Email Jobs tab of the Email Services page, you can view information about your general purpose email processes and transactional email processes, such as status, the number of retries, the number of messages requested and sent, and its date and time. To view additional information about a specific email job, you can search for the job to access its Email Job Details page. When you search for an email job, you can use criteria such as description, email subject, status, and job type.

On the Email Jobs tab, click **Search jobs** under **Email jobs**. On the Email Services Email Job Search screen, enter the criteria of the email job to view and click **Search**. Under **Results**, the email jobs that meet the criteria appear.

To view the Email Job Details of a job, click its name under **Results**. For information about the Email Job Details page, see [Email Process Job Details on page 52](#).

## Delete a Submitted General Purpose Email Process Job

From the Email Services page or an Email Job Details page, you can delete a general purpose email process that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the newsletter content, you can delete the process from the server.

- On the Email Services page, under **Email jobs** on the Email Jobs tab, select the process to delete and click **Delete**.
- On the Email Job Details page, click **Delete**.

When the confirmation message appears, click **Yes**.

## Email Job Statuses

As the Email Services process an email job, activity through the program or on the Shared Services server hosted by Blackbaud determine the current status of the job. The table below explains the statuses of an email job.

Status	Description
<b>Canceled</b>	The email job was canceled or manually stopped on the Shared Services server.
<b>Completed</b>	The Shared Services server finished processing the email job and messages have been sent.
<b>Deleted</b>	A user deleted the email job from the queue.
<b>Exception occurred</b>	The Shared Services server encountered an exception while processing the email job.
<b>Local chunking</b>	The program is sending the data required for the Shared Services server to process the email job, but not all data has yet been sent.
<b>Maximum number of retries exceeded</b>	The email job has been removed from the queue because the program exceeded the maximum number of attempts allowed to send it to the Shared Services server.
<b>Processing</b>	A complete email job has been submitted to the Shared Services server, which is actively processing the job.
<b>Queued</b>	The email job is scheduled to be sent to the Shared Services server, but no data has yet been sent.
<b>Server chunking</b>	The Shared Services server is adding the email job to a group of email jobs to be processed.
<b>Server chunking paused</b>	The Shared Services server paused while adding the email job to a group of email jobs to be processed.
<b>Status unknown</b>	The Shared Services server reports an unknown job status.

## Blacklisted Email Addresses

On the Blacklisted Email Addresses tab of the Email Services page, you can manage the list of email addresses that have been blacklisted to prevent the program from sending email to them.

When you run the email status process, the program records any email addresses that return hard bounces and adds them to the blacklist. A hard bounce indicates a permanent delivery failure such as when the Internet Service Provider reports that an address is canceled or nonexistent. The program

does not blacklist soft bounces that indicate temporary delivery failures such as network issues or full mailboxes.

You can also manually add email addresses to the blacklist to prevent the program from sending email. For example, you can blacklist email addresses that you associate with malicious or fraudulent activity.

You cannot remove email addresses from the Blacklisted Email Addresses tab, but you can update the status of email addresses to allow the program to resume sending email.

The **Blacklisted email addresses** grid the blacklist status of email addresses, the number of failed delivery attempts, and the most recent notification message. To filter the grid by blacklist status, click **Filter**, select a status, and click **Apply**. To remove the filter and view all addresses, click **Reset**.

To search for a blacklisted address, click **Search addresses** On the Email Services Invalid Account Search screen, enter your criteria and click **Search**. Under **Results**, the email addresses that meet the criteria appear. For each address, you can view information such as its blacklist status and number of failed attempts. To return to the Blacklisted Email Addresses tab, select the address to view.

**Note:** For email addresses that return hard bounces, the program synchronizes the Blacklisted Email Addresses tab with *Invalid accounts* in Blackbaud Internet Solutions. However, the program does not synchronize email addresses that you manually blacklist, so these addresses do not appear in *Invalid accounts*. When you mark an address as valid in *Invalid accounts*, the program automatically toggles the status on the Blacklisted Email Addresses tab. Likewise, when you toggle the status of an address on the blacklist, the program automatically marks it as valid in *Invalid accounts*.

## Change the Blacklisted Status of an Email Address

You cannot remove blacklisted email addresses from the Blacklisted Email Addresses tab. To resume sending email to a blacklisted email address, you can toggle its status. For example, if the Internet Service Provider incorrectly reports an email address as invalid and you want to change its status to "Not blacklisted," select the address under **Blacklisted email addresses** and click **Toggle blacklisted status**. On the confirmation message, click **Yes**. You return to the Blacklisted Email Addresses tab.

## Add a Blacklisted Address

From the Email Services page, you can manually add an email address to the blacklist. For example, you can blacklist email addresses that you associate with malicious or fraudulent activity.

### ➤ Add an email address to the blacklist

1. From *Administration*, click **Email services** under **Configuration**. The Email Services page appears.
2. Select the Blacklisted Email Addresses tab.
3. Under **Blacklisted email addresses**, click **Add blacklisted address**. The Add an email address to the blacklist screen appears.
4. Enter the email address to add to the blacklist.
5. In the **Reason** field, enter an explanation for the blacklisted status.

- Click **Save**. You return to the Blacklisted Email Addresses tab. The program no longer sends email to this address.

## Email Services Reports

From *Administration*, you can generate multiple reports to analyze activity with your general purpose and transactional email job processes.

### Transactional Email Job Status Report

With the Transactional Email Job Status report, you can view the status of your transactional email jobs for a specific date or period of time. For example, you can run the report to verify all email job processes completed successfully. When you generate the report, you can select to include only email that meets specific criteria, such as status, recipient, or subject.

For each status, the report displays each job that meets the selected criteria with that status during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. Under **Summary**, you can view a breakdown, by grid and pie chart, of the total emails that meet the selected criteria for each status.

**Transactional Email Job Status Report**

Date range: Last Month    Recipient:   
 Start date: 11/1/2011    Job description:   
 End date: 11/30/2011    Email subject:  View report  
 Status: Completed    Filter by: Date changed

Period: 11/1/2011 - 11/30/2011

**Job Status: Completed**

Job Description	Subject	Recipient	Date Changed	Date Added
Test 1 Trans	Test 1 Trans		11/29/2011 11:06:11 AM	11/29/2011 11:05:45 AM
Test 2 Trans	Test 2 Trans		11/29/2011 11:18:10 AM	11/29/2011 11:18:00 AM
Test 3 Trans	Test 3 Trans		11/29/2011 11:20:10 AM	11/29/2011 11:19:15 AM

**Summary**

Status	Total Emails
Completed	3

#### ➤ View the Transactional Email Job Status report

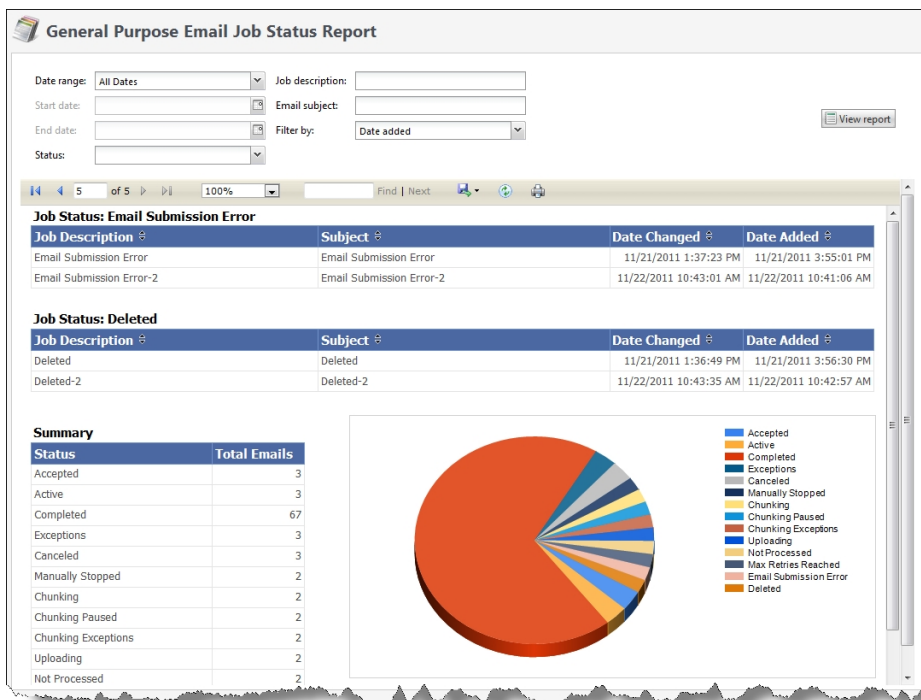
- From *Administration*, click **Email services**. The Email Services page appears.
- Under **Reports**, click **Transactional Email Job Status**. The Transactional Email Job Status report page appears.
- In the **Date range** field, select the time period of the transactional email jobs to analyze.
- By default, the report includes all transactional email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by status, recipient, or subject.

5. Click **View report**. The report generates. From the report menu bar, you can print or export the report as necessary.

## General Purpose Email Job Status Report

With the General Purpose Email Job Status report, you can view the status of your general purpose email jobs for a specific date or period of time. For example, you can run the report to verify all email job processes completed successfully. When you generate the report, you can select to include only email that meets specific criteria, such as status or subject.

For each status, the report displays each job that meets the selected criteria with that status during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. Under **Summary**, you can view a breakdown of the total emails that meet the selected criteria for each status.



### > View the General Purpose Email Job Status report

1. From *Administration*, click **Email services**. The Email Services page appears.
2. Under **Reports**, click **General Purpose Email Job Status**. The General Purpose Email Job Status report page appears.
3. In the **Date range** field, select the time period of the general purpose email jobs to analyze.
4. By default, the report includes all general purpose email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by status or subject.



5. Click **View report**. The report generates. From the report menu bar, you can print or export the report as necessary.

## Transactional Email Jobs Processed Report

With the Transactional Email Jobs Processed report, you can view information about the transactional email jobs processed during a specific date or period of time. For example, you can run the report to view how many email jobs processed for the time period. When you generate the report, you select whether to group the results by every two hours or on a daily or monthly interval. You can also select to include only email that meets specific criteria, such as recipient or subject.

For each interval, the report displays each transactional email job that meets the selected criteria processed during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. You can also view a bar chart of the total emails that meet the selected criteria processed for each interval.

### > View the Transactional Email Jobs Processed report

1. From *Administration*, click **Email services**. The Email Services page appears.
2. Under **Reports**, click **Transactional Email Jobs Processed**. The Transactional Email Jobs Processed report page appears.
3. In the **Date range** field, select the time period of the transactional email jobs to analyze.
4. In the **Grouping** field, select whether to group the results by every two hours or on a daily or monthly interval.
5. By default, the report includes all transactional email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by recipient or subject.
6. Click **View report**. The report generates. From the report menu bar, you can print or export the report as necessary.

## General Purpose Email Jobs Processed Report

With the General Purpose Email Jobs Processed report, you can view information about the general purpose email jobs processed during a specific date or period of time. For example, you can run the report to view how many email jobs processed for the time period. When you generate the report, you select whether to group the results by every two hours or on a daily or monthly interval. You can also select to include only email that meets specific criteria, such as subject.

For each interval, the report displays each general purpose email job that meets the selected criteria processed during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. You can also view a bar chart of the total emails that meet the selected criteria processed for each interval.

### > View the General Purpose Email Jobs Processed report

1. From *Administration*, click **Email services**. The Email Services page appears.

2. Under **Reports**, click **General Purpose Email Jobs Processed**. The General Purpose Email Jobs Processed report page appears.
3. In the **Date range** field, select the time period of the general purpose email jobs to analyze.
4. In the **Grouping** field, select whether to group the results by every two hours or on a daily or monthly interval.
5. By default, the report includes all general purpose email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by subject.
6. Click **View report**. The report generates. From the report menu bar, you can print or export the report as necessary.

## Email Alerts

With email alerts, you can configure the program to automatically notify application users by email when changes in the database impact them. For example, you can set up alerts to inform users in *Batch entry* when ownership of batches transfer to them as the result of a batch status update.

**Note:** To generate system alerts, the program requires that you first set up a profile of Database Mail in your supported installation of Microsoft *SQL Server*. For information about how to configure Database Mail in *SQL Server*, visit the Microsoft Developer Network (MSDN) at <http://msdn.microsoft.com/en-us/library/ms175951.aspx>.

To generate email alerts, you must configure information about the database mail settings in *Administration*. You can then generate standard email alerts to inform users of changes in batch ownership or prospect management or custom email alerts to meet the specific needs of your organization.

## Edit Email Alert Settings

You can use email alerts to automatically email reminders or notifications to application users such as when event tasks are assigned to them. To enable email alerts, you must enter information about your profile of Database Mail set up in *SQL Server*. If Blackbaud does not host your organization's database, you must also enter information about the database to use email alerts.

**Note:** When you enable email alerts for your organization, the Email preferences tab appears on application user records. From this tab, users can select whether to receive specific types of email alerts and enter the email address at which to receive the alerts. For information about the Email preferences tab, see [Configure Email Preferences for Users on page 70](#).

### ➤ Enable email alerts and configure database mail settings for alerts

To generate email alerts, the program requires that you first set up a profile of Database Mail in your supported installation of Microsoft *SQL Server*. For information about how to configure Database Mail in *SQL Server*, visit the Microsoft Developer Network (MSDN) at <http://msdn.microsoft.com/en-us/library/ms175951.aspx>.

1. From *Administration*, click **Email alerts**. The Email alerts page appears.

- Under **Tasks**, click **Edit alert settings**. The Edit alert settings screen appears.

- To enable email alerts for your organization, select **Enabled**.
- Under **Database Mail settings**, enter the name of your Database Mail profile set up in Microsoft *SQL Server*.
- If Blackbaud does not host your organization's database, the **Application URL parts** frame appears. To include links to pages in the program in email alerts, enter the root URL to the program and the name of the database to use with the alerts. This is the virtual directory for the web application. Generally, the format is "http://[Server name]/[Virtual directory name]."
- If Blackbaud does not host your database, the **Selected database** field appears. Enter the name of the database to use with the email alerts.
- Click **Save**. You return to the Email alerts page.

## Standard Email Alert Types

On the Email alert types tab, you can view the types of standard email alerts your organization uses. To update the information in the grid, click **Refresh List**.

To view additional information about an email alert, such as the users who receive the alert and the email message they receive, click its name under **Email alert types**. The record of the email alert type appears. For information about the items on this record, see [Email Alert Record on page 60](#).

## Custom Email Alert Types

To meet the needs of your organization, you can create custom email alerts, such as to inform users when a specific constituent makes a large donation. To manage the custom email alerts for your

organization, select the Custom email alert types tab.

Under **Custom email alert types**, you can view the types of custom email alerts your organization uses. To update the information in the grid, click **Refresh List**.

To view additional information about an email alert, such as the users who receive the alert and the email message they receive, click its name under **Custom email alert types**. The record of the email alert type appears. For information about the items on this record, see [Email Alert Record on page 60](#).

From the grid, you can add and manage the custom email alert types for your organization.

## Add Custom Email Alert Types

To meet the needs of your organization, you can create custom email alerts based on the activity of a data list. For example, you can create an email alert to inform users when a specific constituent makes a large donation. After you add a custom email alert type, you can configure its content and manage instances of the alert. You can also edit and delete custom email alert types as necessary.

### ➤ Add custom email alert types

1. From *Administration*, click **Email alerts**. The Email alerts page appears.
2. Select the Custom email alert types tab.
3. Under **Custom email alert types**, click **Add**. The Add a custom email alert type screen appears.
4. Enter a unique name to help identify the alert type.
5. In the **Data list** field, search for and select the data list on which to base the email alert.
6. Click **Save**. You return to the Email alerts page. Under **Custom email alert types**, the new alert type appears.
7. To configure the email content and design of the email alert, click its name under **Custom email alert types**. The record of the alert appears.

## Email Alert Record

The program automatically creates a record of each type of email alert your organization uses.

To view the record of an email alert from the Email alerts page, click its name on the Email alert types or Custom email alert types tab.

For a custom email alert or a task reminder email alert, you can view and manage the instances of the alert, the email message sent with the alert, and the process that sends the alert to its users. To help you navigate through this information, the record contains the Manage alert definition tab and Process Details tab.

For a standard email alert other than a task reminder alert, you can view and manage the application users who receive the alert and the email message they receive from the record.

Under **Email content**, the subject and body of the email message that application users receive with the alert appears. To edit the email message users receive, click **Edit**. For information about how to edit the email message of an alert, see [Edit Content of an Email Alert on page 61](#).

**Note:** The program automatically includes a link to the area of the application related to the email alert. For example, an email alert that notifies the user of a batch assignment automatically includes a link to the batch in *Batch entry*.

Under **Users**, the names of the application users who receive the email alert appear. To update the information in the grid, click **Refresh List**. From the grid, you can also assign the alert to users or disable the alert for a selected user.

From the record of a custom email alert or task reminder email alert, you can manage the process to send the email alert to remind users to complete their tasks.

## Manage Alert Definition

For a custom email alert or a task reminder email alert, the Manage alert definition tab appears. From this tab, you can configure the email content sent with the alert and view and manage the instances of the alert.

Under **Email content**, the subject and body of the email message that application users receive with the alert appears. To edit the email message users receive, click **Edit**. For information about how to edit the email message of an alert, see [Edit Content of an Email Alert on page 61](#).

For a task reminder email alert, under **Users**, the names of the application users who receive the email alert appear. To update the information in the grid, click **Refresh List**. From the grid, you can also assign the alert to users or disable the alert for a selected user.

For a custom email alert, under **Instances**, you can view information about the alert, such as whether it has a context record or parameters and how many users to which it is assigned. The **Enabled** column indicates whether the alert is enabled. To update the information in the grid, click **Refresh List**.

To view or manage the users assigned to an instance of a custom email alert, click its name under **Instances**. The record of the alert instance appears. For information about the items on this record, see [Custom Email Alert Instance Record on page 66](#).

Under **Instances**, you can also add and manage instances of the alert.

## Edit Content of an Email Alert

When application users receive an email alert, they receive an email message to notify them of changes in the database that affect them. You can edit the subject or body of the email message to better fit the needs of your organization.

**Note:** The program automatically includes a link to the area of the application related to the email alert. For example, an email alert that notifies the user of a batch assignment automatically includes a link to the batch in *Batch entry*.

### > Edit email content

1. From *Administration*, click **Email alerts**. The Email alerts page appears.
2. On the Email alerts page, select the alert with the email content to edit and click **Go to alert type**. The record of the email alert appears.

3. For a custom email alert or a task reminder email alert, select the Manage alert definition tab.
4. Under **Email content**, click **Edit**. The Edit email content screen appears.

5. In the **Email subject** field, edit the subject line of the email message as necessary.
6. Under **Email body**, compose the email message users receive with the alert.

Under **Available merge fields**, a list of merge fields available for the type of email alert appears. To personalize the message, use merge fields to include information specific to the recipient or the change that causes the email alert. To add a merge field in the body, select it under **Available merge fields** and click the right arrow. For example, for an email alert about a change in the ownership of a batch, use merge fields to include information about the number, type, and status of the batch.

7. Click **Save**. You return to the email alert record.

## Assign an Email Alert to Application Users

When you assign an email alert to application users, they receive an email message to notify them of changes in the database that affect them. You can assign email alerts to specific users or a selection of users.

**Tip:** Application users can select whether to receive specific email alerts. For information about how to select to receive an email alert, see [Subscribe to Email Alerts on page 67](#).

### ➤ Assign an email alert to application users

1. From *Administration*, click **Email alerts**. The Email alerts page appears.
2. Select the Email alert types tab.
3. Under **Email alert types**, click the name of the alert to assign to users. The record of the alert appears.
4. For a task reminder email alert, select the Manage alert definition tab.
5. Under **Users**, click **Assign to users**. The Assign to users screen appears.
6. In the **Assign to** field, select whether to assign the email alert to selected users or a specific user.
7. If you select Selected users, in the **Selection** field, search for and select the selection of application users to receive the email alert.  
If you select Specific user, in the **User** field, search for and select the application user to receive the email alert.
8. Click **Save**. You return to the email alert record.

## Disable an Email Alert for an Application User

After you assign an email alert to an application user, you can disable the alert for the user, such as if the user requests to no longer receive the alert. To disable an email alert for an application user from the record of the alert, select the user under **Users** and click **Disable alert**. The program disables the email alert for the user and removes the user from the **Users** grid.

**Tip:** You can also enable email alerts for a user from the application user record. For information about how to manage email alerts from the user record, see [Enable or Disable Email Alerts for an Application User on page 71](#).

## Add Instances of a Custom Email Alert

After you add a custom email alert type, you can add instances of the alert. When you add an instance of an alert, you configure the parameters of when the program sends the alert to user. The parameters depend on the data list on which you base the alert. For example, if you create an alert to notify users when a constituent makes a large donation, you can configure the constituent and minimum donation amount for each instance of the alert.

### ➤ Add instances of an email alert

1. On the record of the email alert, select the Manage alert definitions tab.
2. Under **Instances**, click **Add**. The Add a custom email alert instance screen appears.
3. Enter a unique name to help identify the alert instance.

4. Enter the parameters of when to send the alert. For example, to send an alert to notify users when a constituent makes a large donation, select the constituent and enter the minimum donation amount for which to send an alert.
5. Click **Save**. You return to the email alert record.

After you add an instance of an alert, you can then assign users to the instance so they can receive alerts when you run the send process. For information about how to assign users to the instance, see [Assign Users to a Custom Email Alert Instance on page 66](#).

## Process Details

To send alerts for a custom email alert type or a task reminder email alert, you must run a send process. When you run the send process, the program determines whether changes to the selected data list match the parameters of the alert type. If the changes match the parameters, the program then automatically send alerts to the assigned users to inform them of the change. From the record of the email alert, you can start the send process. For information about how to start the send process, see [Start the Send Process for an Email Alert on page 65](#).

To view the status of the most recent instance of the send process or information about previous instances of the process, select the Process Details tab. From this tab, you can also add and manage job schedules to run the process automatically.

Under **Recent status**, you can view the current status of the process to determine whether it completed successfully. You can also view the status message generated for the most recent run; the user who ran the process and on which server; the dates and times the process started and ended and its duration; and the total number of records processed, how many of those records processed successfully, and how many exceptions it generated.

Under **History**, you can view records of the previous instances the process was run. For each instance, you can view its status, the status message generated for it, the user who ran it, its start and end dates, its duration, the total number of records processed, and which server handled the process. To view all process instances of a specific status, click **Filter** to display the **Status** field and **Apply** and **Reset** buttons. In the **Status** field, select the status of the processes to display such as Did not finish, and click **Apply**.

From the **History** grid, you can also delete records of previous instances of the process. For information about how to delete an instance of the process, see [Delete an Instance of the Send Process on page 65](#).

Under **Job schedules**, you can view the job schedules set for the job. For each job schedule, you can view its job name, whether it is enabled, its frequency, its start date and time, its end date and time, and the dates the schedule was added and changed in the database. From the grid, you can manage the job schedules set for the process.

**Tip:** You can also generate a *Windows* scripting file (\*.wsf) to run the send process with an automated launch program such as *Task Scheduler*. For information about how to create a \*.wsf file for the process, see [Generate a Windows Scripting File for the Send Process on page 65](#).



## Delete an Instance of the Send Process

When you run the send process, the program automatically saves a status record of the instance. On the Process Details tab of the email alert record, the History grid displays the previous instances of the process. You can delete the status record of an instance of the process as necessary.

### ➤ Delete a status record for the Send process

1. On the record of the email alert type from which to delete the instance, select the Process Details tab.
2. Under **History**, select the status record to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the status record.
4. Click **Yes**. You return to the Process Details tab. Under **History**, the status record no longer appears.

## Add a Job Schedule for the Send Process

To automate the send process, you can create job schedule for the process. When you create a job schedule, you define when the job runs, such as weekly or nightly.

## Start the Send Process for an Email Alert

To send alerts for a custom email alert type or a task reminder alert, you must run a send process.

- When you run the send process for a custom email alert, the program determines whether changes to the selected data list match the parameters of the alert type. If the changes match the parameters, the program then automatically sends alerts to the assigned users to inform them of the change.
- When you run the send process for a task reminder alert, the program determines whether users assigned to the alert have active tasks with a due date set for the current date or a future date. If assigned users have active tasks, the program then automatically sends alerts to the users who have not already received a reminder for the task.

To start the send process from the record of the email alert, click **Start send process** under **Tasks**. The status of the process appears on the Process Details tab of the email alert record.

For information about the Process Details tab, see [Process Details on page 64](#).

## Generate a Windows Scripting File for the Send Process

You can generate a *Windows* scripting file (\*.wsf) to use to run the send process with an automated launch program such as *Task Scheduler*.

## Custom Email Alert Instance Record

After you add an instance of a custom email alert, you can assign users to the instance so they can receive alerts when you run the send process. To view and manage the users assigned to the instance of an alert, access the record of the instance. To access the record of an instance from the record of its email alert type, click its name under **Instances**.

Under **Assigned users**, you can view the application users assigned to receive alerts for the instance. You can view the display and user names and the email address at which each user receives the alert. To view additional information about a user, click the user's name. The record of the user appears.

From the grid, you can manage the assignment of users as necessary.

## Assign Users to a Custom Email Alert Instance

When you assign application users to an instance of a custom email alert, they receive an email message to notify them of changes in the database that match the parameters of the alert instance. You can assign a single user or a selection of users to an email alert instance.

### > Assign a single user to an email alert instance

1. On the record of the custom email alert type with the instance to which to assign the user, select the Manage alert definition tab.
2. Under **Instances**, click the name of the instance to assign the user. The record of the instance appears.
3. Under **Assigned users**, click **Assign** and select **User**. The Add user to custom email alert instance screen appears.
4. In the **Application user** field, search for and select the user to assign to the instance.
5. Click **Save**. You return to the record of the instance.

### > Assign a selection of users to an email alert instance

1. On the record of the custom email alert type with the instance to which to assign the users, select the Manage alert definition tab.
2. Under **Instances**, click the name of the instance to assign the user. The record of the instance appears.
3. Under **Assigned users**, click **Assign** and select **Bulk**. The Assign users to a custom email alert instance screen appears.
4. In the **Assign users from selection** field, search for and select the selection of application users to assign to the instance.
5. Click **Save**. You return to the record of the instance.

## Unassign Users from a Custom Email Alert Instance

You can unassign users from an instance of a custom email alert instance, such as if they request to no longer receive the alert. You can unassign a single user or multiple users from an email alert instance.

### › Unassign a single user from an email alert instance

1. On the record of the custom email alert type with the instance from which to unassign the user, select the Manage alert definition tab.
2. Under **Instances**, click the name of the instance to remove from the user. The record of the instance appears.
3. Under **Assigned users**, select the user to remove from the instance.
4. On the action bar, click **Unassign** and select **User**. A confirmation message appears.
5. Click **Yes**. You return to the record of the alert instance.

### › Unassign multiple users from an email alert instance

1. On the record of the custom email alert type with the instance from which to unassign the users, select the Manage alert definition tab.
2. Under **Instances**, click the name of the instance to remove from the users. The record of the instance appears.
3. Under **Assigned users**, click **Unassign** and select **Bulk**. The Unassign users from a custom email alert screen appears.
4. Select whether to unassign all currently subscribed users or only a selection of users.  
If you select **Unassign selected users**, search for and select the selection of application users to remove from the alert instance.
5. Click **Yes**. You return to the record of the instance.

## Subscribe to Email Alerts

Throughout the program, you can select to receive email alerts as notification for various changes to the database. When you subscribe to an email alert, you can enter the email address at which you receive the alert.

**Tip:** You can also enable email alerts from your application user record. For information about how to manage email alerts from an application user record, see [Enable or Disable Email Alerts for an Application User on page 71](#).

## Configure Appeal Mailing Task Email Alerts

From the record of an appeal mailing, you can select to receive email alerts as notifications when the ownership of an appeal mailing task transfers to you. You can also select to receive alerts as reminders

of tasks to complete for the appeal mailing.

### ➤ **Configure settings for email alerts for appeal mailing tasks**

To generate email alerts in *Marketing and Communications*, the system administrator must first configure your database mail settings. For information about how to configure these settings, see [Edit Email Alert Settings on page 58](#).

1. Open the record of the appeal mailing for which to receive email alerts.
2. Under **Tasks**, click **Email alerts**. The Configure appeal mailing task email alerts screen appears.
3. Select whether to receive email alerts when the ownership of a task for the mailing transfers to you.
4. To receive email alerts to remind you of tasks pending for the mailing, select **Send me an alert for task reminders**.
5. If you select to receive an alert, in the **Send email alerts to** field, enter the email address to receive alerts.
6. Click **Save**. You return to the appeal mailing record.

## Configure Batch Email Alerts

In *Batch entry*, you can select to receive email alerts as notification when the ownership of batches transfer to you as the result of a batch status update, the addition of a new batch, or an edit of a batch's properties.

### ➤ **Configure settings for email alerts for batches**

To generate email alerts in *Batch entry*, the system administrator must first configure your database mail settings. For information about how to configure these settings, see [Edit Email Alert Settings on page 58](#).

1. On the Batch Entry page, click **Email alerts** under **Tasks**. The Configure batch email alerts screen appears.
2. Select whether to receive email alerts when the ownership of a batch transfers to you in *Batch entry*.
3. If you select to receive an alert, in the **Send email alerts to** field, enter the email address to receive alerts.
4. Click **Save**. You return to the Batch Entry page.

## Configure Prospect Email Alerts

In *Prospects*, major giving fundraisers can select to receive email alerts as notification when they become the manager on a prospect or prospect plan. For example, you can Email alerts to notify fundraisers when another user assigns them as the primary or secondary manager on the record of a prospect plan.

To generate system alerts for a fundraiser, you must Email alerts from the record of the fundraiser to receive the alerts. To receive email alerts, the fundraiser must be linked to an application user.

### > Configure prospect email alerts for a fundraiser

To generate email alerts in *Prospects*, the system administrator must first configure your database mail settings. For information about how to enable email alerts, see [Edit Email Alert Settings on page 58](#). For more information about prospect plans and fundraisers, see the *Prospects Guide*.

1. Open the record of the fundraiser to receive email alerts.
2. Under **Tasks**, click **Email alerts**. The Configure prospect email alerts screen appears.

**Note:** To receive email alerts, the fundraiser must be linked to an application user. If **Email alerts** is disabled, you must first link the fundraiser to a user. For information about how to link constituents to application users, see the *Constituents Guide*.

3. Select when the fundraiser should receive an email alert.
  - **Send me an alert when I am assigned as the prospect manager**—To notify the fundraiser by email alert when they are assigned as the primary manager for a major giving prospect, select this option.
  - **Send me an alert when I as assigned as the primary manager on a prospect plan**—To notify the fundraiser by email alert when they are assigned as the primary manager for a prospect plan, select this option.
  - **Send me an alert when I as assigned as the secondary manager on a prospect plan**—To notify the fundraiser by email alert when they are assigned as the secondary manager for a prospect plan, select this option.
4. In the **Send email alerts to** field, enter the email address to use for alerts.
5. Click **Save**. You return to the fundraiser record.

## Configure Marketing Plan Item Task Email Alerts

From *Marketing and Communications*, you can select to receive email alerts as notification when the ownership of tasks for items on marketing items transfer to you, such as the result of a the addition of

a new task or an edit of an item task.

### ➤ **Configure settings for email alerts for marketing plan item tasks**

To generate email alerts in *Marketing and Communications*, the system administrator must first configure your database mail settings. For information about how to configure these settings, see [Edit Email Alert Settings on page 58](#).

1. Open the record of the marketing plan for which to receive email alerts.
2. Under **Tasks**, click **Email alerts**. The Configure plan item task email alerts screen appears.
3. Select whether to receive email alerts when the ownership of an item task for the marketing plan transfers to you.
4. If you select to receive an alert, in the **Send email alerts to** field, enter the email address to receive alerts.
5. Click **Save**. You return to the marketing plan record.

## Configure Event Task Email Alerts

From the record of an event, you can select to receive email alerts as reminders of tasks to complete for the event.

### ➤ **Configure settings for email alerts for event tasks**

To generate email alerts in *Events*, the system administrator must first configure your database mail settings. For information about how to configure these settings, see [Edit Email Alert Settings on page 58](#).

1. Open the record of the event for which to receive email alerts.
2. Under **Tasks**, click **Configure email alerts**. The Configure event task email alerts screen appears.
3. To receive email alerts to remind you of tasks pending for the event, select **Send me an alert for task reminders**.
4. If you select to receive an alert, in the **Send email alerts to** field, enter the email address to receive alerts.
5. Click **Save**. You return to the event record.

## Configure Email Preferences for Users

The Email preferences tab appears on application user records. On this tab, you can view and manage the email alerts that the application user receives and the email address at which the user receives alerts.

**Note:** The Email preferences tab appears on application user records only if you have enabled email alerts. For more information, see [Edit Email Alert Settings on page 58](#).

Under **Email alert settings**, the email address at which the application user receives email alerts appears. For information about how to edit the email address, see [Edit Alert Settings for an Application User on page 71](#).

Under **Email alerts**, the types of email alerts the application user can receive appears. To update the information in the grid, click **Refresh List**. For each alert, you can view whether the alert is enabled for the user. For information about how to select the alerts the user receives, see [Enable or Disable Email Alerts for an Application User on page 71](#).

Under **Custom email alerts**, the types of custom email alerts the application user can receive appears. To update the information in the grid, click **Refresh List**. For each alert, you can view its type and name. When the user is assigned to the alert from the alert record rather than the application user record, a checkmark appears in the **Is system-defined** column. From the grid, you can add and manage the custom email alerts assigned to an application user. For information about how to manage the custom email alerts assigned to a user, see [Manage Custom Email Alerts for an Application User on page 72](#).

## Edit Alert Settings for an Application User

For an application user to receive email alerts, you must enter the email address at which the user prefers to receive the alerts. You can edit this email address as necessary, such as if the user changes the preferred address.

### > Edit alert settings

1. On the record of the application user with the alert settings to edit, select the Email preferences tab.
2. Under **Alert settings**, click **Edit**. The Edit alert settings screen appears.
3. Enter the email address where the user requests to receive email alerts.
4. Click **Save**. You return to the application user record.

## Enable or Disable Email Alerts for an Application User

With email alerts, the program can automatically notify application users by email when changes in the database impact them. From the record of an application user, you can manage the email alerts the user receives.

**Note:** When you enable an alert, the user receives the selected alert type at the email address that appears under **Alert settings** on the Email preferences tab. If the user does not have an email address entered when you attempt to enable an alert, the Edit alert settings screen appears so you can enter an address for the user. For information about the Edit alert settings screen, see [Edit Alert Settings for an Application User on page 71](#).

### > Enable an email alert for an application user

1. On the record of the application user for whom to enable the email alert, select the Email preferences tab.

2. Under **Email alerts**, select the alert to enable.
3. On the action bar, click **Enable**. The program enables the email alert for the user. You return to the Email preferences tab. Under **Email alerts**, a checkmark appears in the **Enabled** column for the selected alert.

### ➤ **Disable an email alert for an application user**

1. On the record of the application user for whom to disable the email alert, select the Email preferences tab.
2. Under **Email alerts**, select the alert to disable.
3. On the action bar, click **Disable**. The program disables the email alert for the user. You return to the Email preferences tab.

## Manage Custom Email Alerts for an Application User

Your organization can create custom email alerts to inform users of activity in the database. For example, you can create an alert to inform a user when specific constituents make a large donation. From the record of an application user, you can manage the custom email alerts the user receives.

**Note:** When you assign a custom alert to a user, the user receives the selected alert type at the email address that appears under **Alert settings** on the Email preferences tab. If the user does not have an email address entered when you attempt to assign an alert, the Edit alert settings screen appears so you can enter an address for the user. For information about the Edit alert settings screen, see [Edit Alert Settings for an Application User on page 71](#).

### ➤ **Add a custom email alert to an application user**

1. On the record of the application user for whom to enable the email alert, select the Email preferences tab.
2. Under **Custom email alerts**, click **Add**. The Alert type search screen appears so you can select the custom email alert type to add to the user.
3. After you select the alert type, the parameters screen for the selected alert type appears. Configure the parameters for when the user receives the alert. For example, to inform the user when a constituent makes a large donation, select the constituent and enter the minimum revenue amount for which to send an alert.
4. Click **OK**. You return to the Email preferences tab.



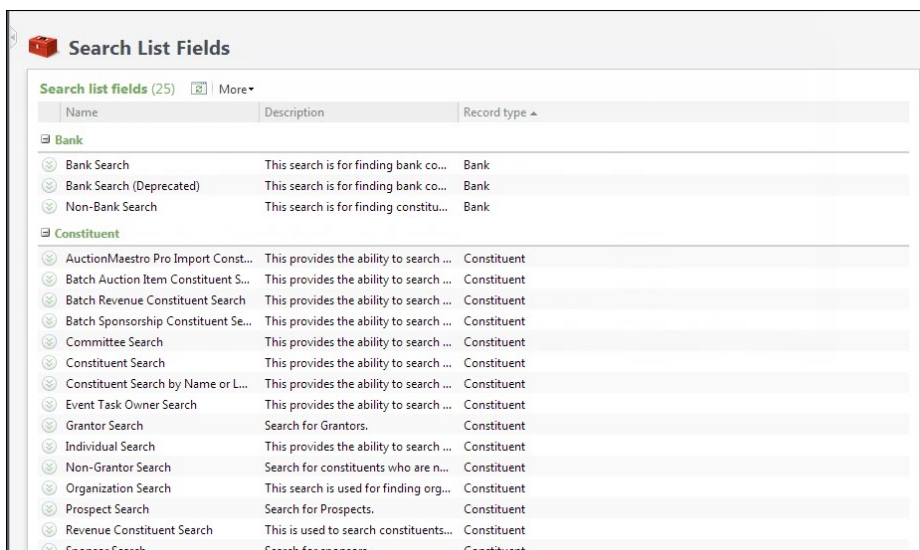
# Search List Configuration

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<b>Manage Search List Replacements</b> .....	<b>74</b>

The program provides multiple search lists to search for and select records. To better meet the needs of your organization, the default search lists support optional output columns and filters. You can configure the fields included in the filters and output of search results. You can also replace a default search list with another search list, such as one configured for your organization.

## Configure Search List Fields

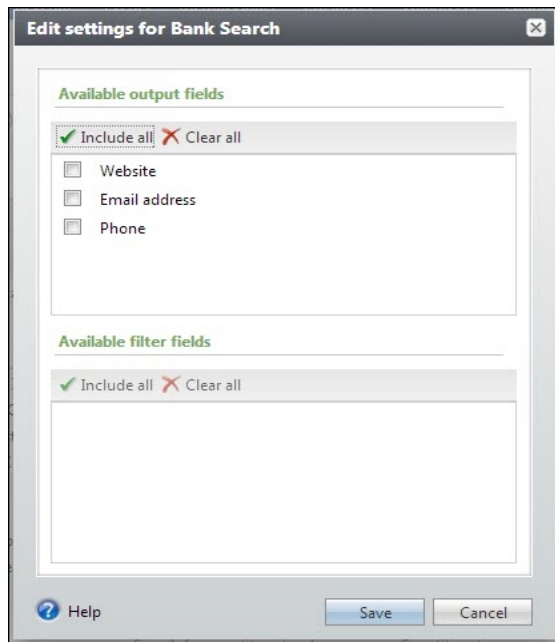
To better meet the needs of your organization, the default search lists provided by the program support optional output columns and filters. For example, while the default constituent search list does not allow you to filter searches based on email address information, the ability to filter on this information may be useful for communication with constituents. To view the constituent search lists available for configuration from *Administration*, click **Search list configuration**. On the Search list configuration page, click **Configure search list fields**. The Search List Fields page appears.



Under **Search list fields**, the search lists that support optional columns and filters appear. You can configure these search lists as necessary to allow users to filter on or provide output for additional fields.

### ➤ Edit the search list field settings

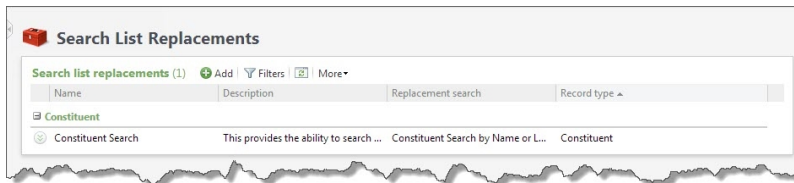
1. From *Administration*, click **Search list configuration**. The Search list configuration page appears.
2. Click **Configure search list fields**. The Search List Fields page appears.
3. Under **Search list fields**, select a search list and click **Edit settings**. The Edit settings screen appears.



4. Under **Available output fields**, select the additional information to appear under **Results** on the search screen. To include all output fields, click **Include all**. To remove all fields from the search screen, click **Clear all**.
5. Under **Available filter fields**, select the additional search criteria fields to appear on the search screen. To include all filter fields, click **Include all**. To remove all fields from the search screen, click **Clear all**.
6. Click **Save**. You return to the Search List Fields page. The next time you access the search screen, the selected output and filter fields appear.

## Manage Search List Replacements

To better meet the needs of your organization, you can replace a default search list with another search list. For example, you can replace the default constituent search list to one that uses only the lookup ID to select a constituent. To add and manage replacement search lists from *Administration*, click **Search list configuration**. On the Search list configuration page, click **Manage search list replacements**. The Search List Replacements page appears.



Under **Search list replacements**, you can view the replacement search lists configured for your organization. For each search list replacement, you can view the original default search list and its replacement search list. You can also view the record type associated with each search list replacement. To view only search list replacements of a specific record type, click **Filter**, select the record type to view, and click **Apply**. Only replacements of the selected record type appear in the grid. To remove the filter, click **Reset**.

**Note:** You can use an existing search list to replace a default search list in the program. To meet the needs of your organization, Blackbaud Services or your system administrator may also add a custom search list to use as a replacement for a default search list.

From the grid, you can add and manage search list replacements as necessary.

**Note:** If you add a constituent attribute category and select “Constituent record” as your data type, you can select a search list for users to select constituents as the attribute values for this category. If you change the default search list or create a custom search list to use, you must also change the search list for the attribute category.

### ➤ Add search list replacements

1. From *Administration*, click **Search list configuration**. The Search list configuration page appears.
2. Click **Manage search list replacements**. The Search List Replacements page appears.
3. Under **Search list replacements**, click **Add**. The Add a search list replacement screen appears.

4. In the **Search list** field, select the search list to replace with a new search list.
5. In the **Replace with** field, select the search list to use instead of the selected search list.
6. Click **Save**. You return to the Search List Replacements page.

# Code Tables

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Code tables increase data entry speed and accuracy throughout the program. When users enter information into a field with a code table, they can quickly access a list of possible entries for that field to select an entry rather than type it manually.

Code tables also help maintain consistency in your data entry. For example, when users add a new constituent phone number, one may enter "Cell Phone" as a phone type, another may enter "Mobile," and yet another may enter "Cell." All three designate the same phone type. To prevent inconsistency and ease the interpretation and retrieval of information from your database in queries and reports, you can enter your organization's accepted phone types in **Code Tables** and limit the rights of your users to add and edit table entries.

## Access Code Tables

To view and manage your organization's code tables, from *Administration*, click **Code tables**. The Code Tables page appears.

**Warning:** To ensure the validity of your database and consistency of your data entry, we recommend you limit rights to manage code table entries to only a few key users. This also increases the accuracy of your records and reports. For information about how to limit rights, see [Establish User Permissions for Code Tables on page 79](#).

In the program, users access code table entries (along with value list fields and simple data list fields) from the drop-down arrow at the end of a field. Depending on permission settings, users can enter text directly in the field. If the program does not recognize the text as an existing code table entry, it asks whether to add the text as a new entry. To access a screen to view code table entries, users can also press **F7** on their keyboard when the cursor is in the table field. Depending on permission settings, users can also add and manage entries from this screen.

## Manage Code Table Entries

From the Code Tables page, you can add and manage code table entries. To view the entries for a code table, in the **Category** field, select the type of code table to view. To open a code table, click the name of a code table in the list. The Table Entries page for the code table appears.

From the grid, you can add and manage the entries for the code table.

## Add New Table Entries

You can add entries for code tables. When you add a code table entry, you enter its description to appear as a selection for the table throughout the program.

**Warning:** To ensure the validity of your database and consistency of your data entry, we recommend you limit rights to add code table entries to only a few key users. This also increases the accuracy of your records and reports. For information about how to limit rights, see [Establish User Permissions for Code Tables on page 79](#).

### > Add a new table entry

1. From *Administration*, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, in the **Category** field, select the type of code table. In the list, click the name of the code table to open. The Table Entries page appears.

**Note:** You can also add entries from the lookup screen for the code table. For information about the lookup screen, see [Show Lookup Screen on page 78](#).

3. Click **Add**. The New Table Entry screen appears.

The screenshot shows a software interface for adding a new table entry. At the top, there is a text input field labeled 'Description:'. Below this is a 'Filtering' section containing a dropdown menu for 'Availability' currently set to 'Selected sites'. The central part of the interface is a tree view with the following structure:

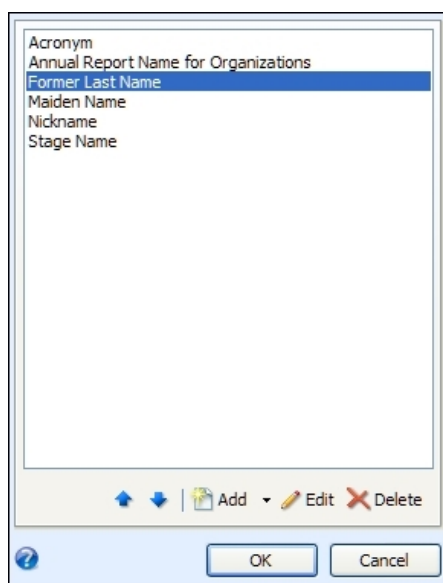
- University (selected with a blue square)
  - Medical (checked with a green checkmark)
    - Cancer (checked with a green checkmark)
    - Research (checked with a green checkmark)
  - Law (unchecked)
    - Patent (unchecked)
    - Criminal (unchecked)

At the bottom of the tree view are two buttons: 'Select all' and 'Unselect all'. Below the entire form are two buttons: 'Save' and 'Cancel'.

4. Enter a description to help identify the new table entry.
5. Under **Filtering**, select whether to make the entry available to all sites at your organization or only selected sites. If you select "Selected sites," choose which sites can use the entry.
6. Click **Save**. You return to the Table Entries page. The next time a user accesses the code table through a field, the new entry appears as an option.

## Show Lookup Screen

To view all available entries for a code table, select the table on the Code Tables page and click **Show lookup**. The lookup screen for the code table appears and displays all entries for the code table.



From the lookup screen, you can view and manage the entries for the code table. For a code table with a user-defined sort method, you can also arrange the order of the entries as necessary.

**Note:** For information about sort methods, see [Edit the Sort Method of Code Table Entries on page 79](#).

- To add an entry to the code table, click **Add**. The New Table Entry screen appears so you can enter the description of the entry.

If you use the alphabetical sort method, the new entry appears in alphabetical order. If you use the user-defined sort method, select whether to add the new entry to the bottom of the list or above the selected entry.

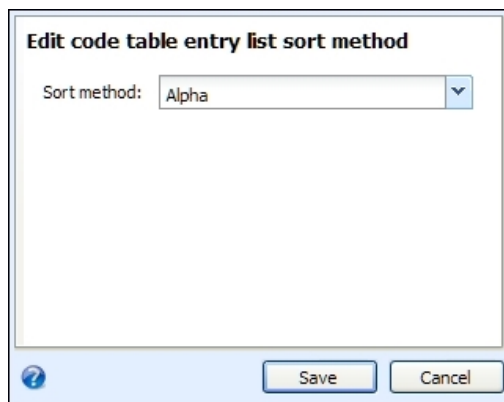
- To edit an entry, select it and click **Edit**. The Edit Table Entry screen appears so you can edit the entry as necessary.
- To permanently remove an entry from your database, select it and click **Delete**. When a message appears to ask whether to delete the entry, click **Yes**.
- To arrange the order of the entries for a table with a user-defined sort method, select the entry to move and click the up or down arrow as necessary.

## Edit the Sort Method of Code Table Entries

You can select whether to display code table entries alphabetically or in a user-defined method. For example, you may select to sort entries so more commonly selected entries appear first in the code table. In the program, the entries appear for code table fields in the same order as you arrange in *Administration*.

### > Edit sort method of entries for a code table

1. From *Administration*, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, select a table and click **Edit sort method**. The Edit code table entry list sort method screen appears.



3. Select whether to sort the entries of the table alphabetically or in a user-defined method.
4. Click **Save**. You return to the Code Tables page.

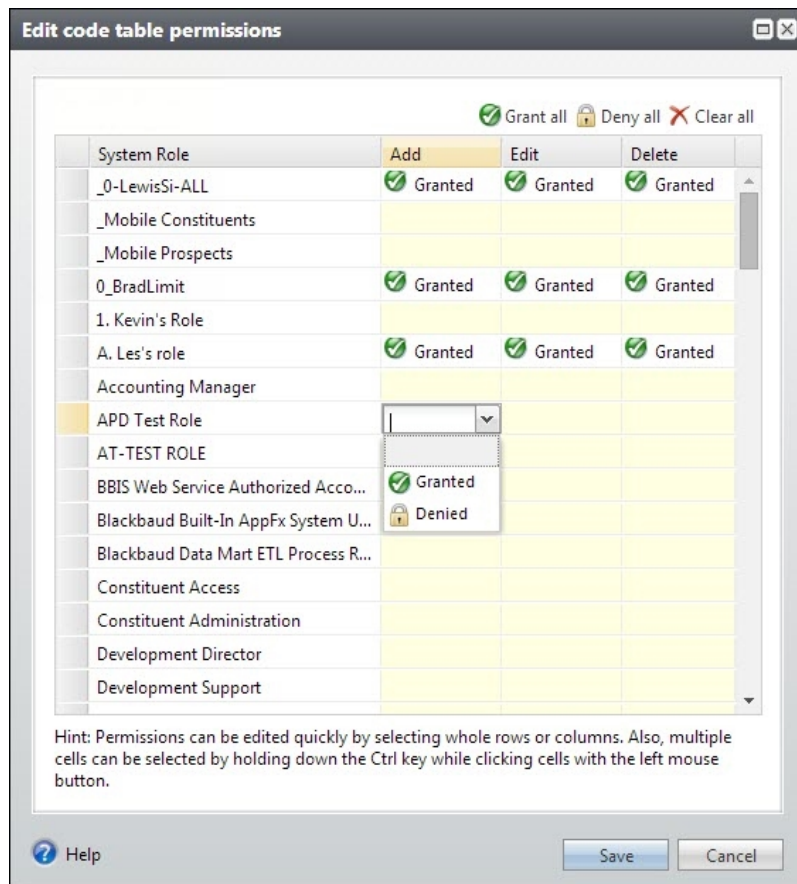
## Establish User Permissions for Code Tables

You can grant or deny your users permission to add, edit, and delete code table entries. Code tables provide entry options in various fields in the program. If you grant rights to change a code table, users can press **F7** on the keyboard when the cursor is in its table field to manage its entry list from its lookup screen. To limit your table entries to a reasonable number and protect the consistency of your database, we recommend you limit code table permissions.

**Note:** Any user can click **F7** to access the code table lookup screen, regardless of the permission settings. Permissions control only a user's ability to add, edit, and delete entries.

### > Establish user permissions to add, edit, and delete code table entries

1. From *Administration*, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, select the table for which to establish permissions.
3. Click **Assign permissions**. The Edit Code Table Permissions screen appears.



4. In the **System Role** column, locate the system role for which to establish permission settings.
5. Assign the selected system role permissions:
  - To establish an Add permission to determine whether users can add new entries to the code table, in the **Add** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to add an entry.

**Note:** If you do not grant or deny a role permission, but leave the setting blank, the following occurs: If a user belongs to no other roles, the user is not granted rights; if the user belongs to another role to which permissions are granted, the user has the rights assigned that role. In addition, Deny trumps Grant, and Grant trumps no entry.

- To establish an Edit permission to determine whether users can edit the entries of a code table, in the **Edit** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to edit an entry.
- To establish a Delete permission to determine whether user can delete entries from the code table, in the **Delete** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to delete an entry.
- To grant all system roles permission to manage the code table, click **Grant All**.



- To deny all system roles permission to manage the code table, click **Deny All**.
  - To clear all boxes in the grid and start over, click **Clear All**.
6. Click **Save**. Your return to the Code Tables page.

# Educational Catalog

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From the Educational catalog area in *Administration*, you can track educational institutions and, if your product has the academic catalog, you may build and manage it for affiliated institutions. Affiliated institutions are related to your organization, usually because you are an educational institution and want to track detailed information about your institution and academics.

## Educational Institutions

You can track two types of educational institutions: unaffiliated and affiliated. For unaffiliated institutions, you can track basic information about other schools and educational institutions, such as location.

For affiliated institutions, you can enable the academic catalog to track more detailed information about the academics of the institution, such as the different programs and degrees offered. You can track more detailed information on the constituent records of alumni. When you add or edit educational institutions, you can designate them as affiliated.

## Add Educational Institutions

Educational institutions are schools, colleges, or universities you can associate with your constituent records. When you add or edit educational institutions, you can designate them as affiliated.

For affiliated institutions, you can also track more detailed information about the academics of the institution, such as the different programs and degrees offered.

### > Add an educational institution

1. From *Administration*, click **Educational catalog**.
2. Select the Educational Institutions tab and click **Add**. The Add an educational institution screen appears.

**Add an educational institution**

FICE code:

Name:

This institution is affiliated with our organization

**Primary contact information**

Country:

Address:

City:

State:

ZIP:

Phone number:

Help Save Cancel

3. If applicable, in the FICE field, enter the FICE code of the educational institution. A FICE code is a number formerly assigned to all two-year or higher educational institutions by the Federal Interagency Committee on Education. FICE codes are no longer assigned, but may still be used to help track institutions.
4. If the institution is affiliated with your organization, select **This institution is affiliated**. For affiliated institutions, you can track more detailed information about the academics of the

institution, such as the different programs and degrees offered, using the Academic Catalog. For more information, see [Academic Catalog on page 84](#).

5. In the **Name** field, enter the name of the educational institution.
6. Under **Primary contact information**, enter address and phone information for the educational institution.
7. Click **Save**. Affiliated institutions are displayed before unaffiliated ones on the Educational Institutions tab.

## Academic Catalog

The Academic Catalog is used to track more detailed information about the academics of the affiliated educational institutions, such as the different programs and degrees offered. The Academic Catalog is a hierarchical view of the programs and degrees. The structure maps to the categories and counts on the VSE survey and report.

There are up to seven levels in the Academic Catalog. VSE reporting relies on the top level in the Academic Catalog hierarchy. The top level is a **Program**. After **Program**, the levels are **Degree**, **College**, **Division**, **Department**, **Sub department**, and **Degree type**. **Division** and **Sub department** are optional.

Your organization may have a Academic Catalog hierarchy such as: Undergraduate (**Program**), Bachelor of Science (**Degree**), School of Math and Science (**College**), Mathematics (**Division**), Department of Math and Computer Science (**Department**), Calculous and Trigonometry (**Sub-department**) and BS in Math or Minor in Middle School Mathematics(**Degree type**).

You can use the Academic Catalog to show current and historical views of how your institution is arranged. This allows you to track the specific degree and program information for alumni based on when they attended your institution. For example, the School of Business may be renamed in honor of an important alumni or donor. An asterisk next to an item in the Academic Catalog indicates there is historical information for that item.

## Enable the Academic Catalog

To use the academic catalog, go to the Educational Catalog page in *Administration*. Click **Edit configuration** under **Tasks** and select **Use academic catalog**. The Academic Catalog tab now appears on the Educational Catalog page.

## Add to the Academic Catalog

When building the academic catalog, you must first select the affiliated institution on the Academic Catalog tab. The top level of the Academic Catalog hierarchy is **Program**. After the program, the levels are **Degree**, **College**, **Division**, **Department**, **Sub-department**, and **Degree type**. **Division** and **Sub-department** are optional. Your organization may have a Academic Catalog hierarchy such as: Undergraduate (**Program**), Bachelor of Science (**Degree**), School of Math and Science (**College**), Mathematics (**Division**), Department of Math and Computer Science (**Department**), Calculus and

Trigonometry (**Sub-department**) and BS in Math or Minor in Middle School Mathematics(**Degree type**).

## Add Programs

Programs are the top level of the Academic Catalog. A **Program** can be Undergraduate, Graduate, Doctorate, No degree, or Other. These programs map directly to the VSE survey and report. You can have only one **Program** of each type for each affiliated institution.

## Add Degrees

Degrees are the second level of the Academic Catalog. A **Degree** could be "Bachelor of Science," for example. For each **Degree**, enter a unique ID, a name, and a date from which this **Degree** is effective. Only the ID must be unique among other degrees.

**Note:** You can also enter short codes and descriptions for degrees.

## Add Colleges

Colleges are the third and middle level of the Academic Catalog. A **College** could be "School of Science and Math," for example. For each **College**, enter a unique ID, a name, and a date from which this **College** is effective. Only the ID must be unique among other colleges.

## Add Divisions

Divisions are the fourth level of the Academic Catalog. A **Division** could be "Mathematics and Computer Science" for example. For each **Division**, enter a unique ID, a name, and a date from which this **Division** is effective. Only the ID must be unique among other divisions.

## Add Departments

Departments are the fifth level of the Academic Catalog. A **Department** could be "Math Department," for example. For each **Department**, enter a unique ID, a name, and a date from which this **Department** is effective. Only the ID must be unique among other departments.

**Note:** You can also enter short codes and descriptions for departments.

## Add Sub Departments

Sub departments are the sixth level of the Academic Catalog. A **Sub department** could be "Calculus and Trigonometry," for example. For each **Sub department**, enter a unique ID, a name, and a date from which this **Sub department** is effective. Only the ID must be unique among other sub departments.

**Note:** You can also enter short codes and descriptions for sub departments.

## Add Degree Types

Degree types are the lowest level of the Academic Catalog. A **Degree type** could be “BS in Math” or “Minor in Middle School Mathematics,” for example. For each **Degree type**, enter a unique ID and select a type. The **Degree type** must be unique within the department, but could be used in other departments.

## Scholarship Terms

To provide scholarship fund donors another level of detail about how your organization distributes funding to scholarship recipients, you can define scholarship terms. You can select the term for which an award applies when you add a recipient to a scholarship fund. This information appears in the stewardship report generated by the stewardship package process for the fund. For example, if you add “Summer Study Abroad” and “Winter Study Abroad” to the Scholarship Terms tab, when you add a recipient to a scholarship fund, you can select which term the award applies to. Stewardship recipients can view the scholarship recipients and the amounts awarded for each term.

For more information about fund stewardship, see the Fundraising Purposes chapter of the *Fundraising Guide*.

## Add Scholarship Terms

When you add a recipient to a scholarship fund, you can select a scholarship term for the award.

### > Add a scholarship term

1. From *Administration*, click **Educational Catalog**.
2. On the Scholarship Terms tab, click **Add**. The Add a scholarship term screen appears.

The screenshot shows a dialog box titled "Add a scholarship term". It has a light blue header bar with a question mark icon on the left. The main area is white and contains three input fields: "Name:" with the text "Summer Study Abroad", "Start date:" with a dropdown arrow, and "End date:" with a dropdown arrow. At the bottom of the dialog are two buttons: "Save" and "Cancel".

3. Enter a name and date range for the term.
4. Click **Save**. You return to the Scholarship Terms tab.

# Academic Code Tables

From the Educational Catalog page, you can manage entries in academic code tables for Department, Sub Department, and Degree.

**Note:** When you add or edit from the Academic Code Tables tab on the Educational Catalog page, fields for **Short code** and **Description** appear. However, when you add or edit from the Code Tables page in *Administration* or from options under **Tasks**, those fields do not appear.

## > Add an academic code table entry

1. From *Administration*, click **Educational catalog**. The Educational Catalog page appears.
2. From the Academic Code Tables tab, under **Department**, **Sub Department**, or **Degree**, click **Add**. The add screen appears.
3. Enter a description to help identify the new entry. This is how the entry appears throughout the program.
4. You can also enter short codes and, for degrees, a long description.
5. Under **Filtering**, select whether to make the entry available to all sites at your organization or only selected sites. If you select Selected sites, select the checkboxes of the sites to use the entry.

**Warning:** To ensure the validity of your database and consistency of your data entry, we recommend you limit rights to add code table entries to only a few key users. This also increases the accuracy of your records and reports. For information about how to limit rights, see [Establish User Permissions for Code Tables on page 79](#).

# Global Change

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The **Global changes** functionality allows you to make select changes to a specific group of records in your system. For example, trustees for your organization are rotated annually, so every year you have to remove the "Trustee" constituency from all previous year trustees. Using a selection of your previous year trustees, you can use the "Delete user-defined constituency" definition included in **Global changes** and remove the "Trustee" constituency from all expired trustees' records.

To access Global changes, from *Administration*, click **Global changes** under **Data**.

## Add a Global Change Instance

A global change instance defines what you want changed where. Once you create an instance, it is saved in the **Global changes** grid on the Global Changes page. You can process and reprocess the instance at anytime and even open the existing instance and make any necessary changes.

### > Add a global change instance

1. From the Global Changes page, click **Add**. The Select a global change definition screen appears.

2. Select the global change definition that meets your needs. For example, if you want to delete a constituency from selected records, select "Delete user-defined constituency"; if you want to add a constituent attribute to selected records, select "Add constituent attributes".
3. Click **OK**. The Add global change screen appears. The fields and options included on this screen vary, based on the global change definition you selected in step 2.
4. Complete the Add global change screen. In this section all definitions are explained and information is included about the fields and options included on the specific definition add screen.
5. Click **Save**. The new global change instance appears in the **Global Changes** grid.

## Assign Global Change Permissions

You can control system role permissions granted to each individual global change instance. Using the **Assign Permissions** functionality, you can control who has access to change, execute, and delete you global change instance.

When a user assigned the specific role opens the program, only instances for which they are granted permission appear.

### > Set user permissions for global change instances

1. From the Administration page, click **Global changes**. The Global Changes page appears displaying any existing global change instances.
2. Select a global change instance and click **Assign Permissions**. The Assign Permissions screen appears.
3. To grant permission to all roles in your system, select **All roles**.  
To select the individual roles to which you want to "Grant" or "Deny" permission, select **Selected roles**.
  - a. The **System Roles** box is activated, and you can select a role.
  - b. To grant the selected role access, click **Grant**; to deny the selected role access, click **Deny**; to clear an assignments, click **Clear**.
4. Click **Save** to save your assignments and close the Assign Permissions screen.

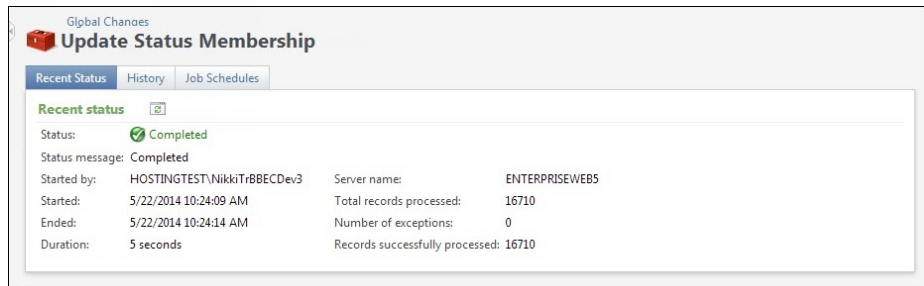
## Process Global Changes

Once you create or edit a global change instance, defining specifically what you want changed and where, you must process the instance. This executes the change, updating all selected records.

The global change process record displays status and history information about the selected global change instance. You can also schedule a global change processing job.

### ➤ Process a global change instance

1. From the Global Changes page, select the instance you want to process.
2. Click **Process global change**. The selected records are changed, and the process screen appears.



## Global Change Process Record

The global change process record displays status and history information about the selected global change instance. You can also schedule a global change processing job.

**Note:** For information about executing a global change, see [Process Global Changes on page 90](#).

## View a Global Change Process Record

Whenever you process a global change, the selected global change process record automatically opens after the process generates. When not processing changes, you can open process records from the Global Changes page.

### ➤ Open an existing global change process record

1. From the Global Changes page, click the name of the global change process you want to view. The selected process record appears.
2. Also from this screen, the following **Tasks** are available:
  - **Start process:** Processes the global change.
  - **Edit global change:** Accesses the Edit global change screen.
  - **Create job schedule:** Accesses the Create Job screen.
  - **Delete global change:** Removes the global change instance from the system.

## Recent Status

The Recent status tab displays information about the most recent global change process. For example, if the process "Completed", the tab displays dates and times of the last change, the number of records

processed, the number of exceptions, and much more.

## History

The History tab lists all global changes executed for the selected global change instance. It includes information about dates, status, duration, and more. You can also delete archived processing records from this tab.

## Delete Archived Global Change Process Record

You can permanently delete any archived global change process record stored on the History tab.

### › Delete a global change process record from the History tab

1. From the global change process record, select the History tab.
2. Select the archived record you want to delete.
3. Click **Delete**. A confirmation message appears.
4. Click **Yes**. The record is deleted, and you return to the History tab.

## Job Schedule

You can arrange to process global changes automatically, even during off-hours, from the Job Schedule tab available in the global change process record.

Using *SQL Server Agent* jobs, the program automatically processes global changes, and it executes the changes on a recurring basis, following the instructions you set. Scheduling jobs involves defining the condition or conditions that cause the job to begin running.

## Reset Last Run Date

Whenever you execute a selected global change, the program process the change based on any new data entered in the database since the **Last run on** date. This date displays in the **Global Changes** grid on the Global Changes page.

If for some reason, you want the program to process the change for all selected records, regardless of if the records were included in the last execution of the global change, you can reset the **Last run on** date by selecting the instance in the **Global Changes** grid and clicking **Reset last run on date**. A confirmation screen appears. Click **Yes** to reset the **Last run on** date.

## Global Change Definitions

Depending upon the global change that you process, there are parameters specific to that change. This section contains definitions and procedures for each global change.

## Delete Audit Tables

Over time your database can accumulate numerous audit tables you no longer need. Use the **Delete Audit Table** definition to permanently remove audit data from these tables. After you create the definition, you can execute the global change process to remove the data.

For more information about processing a global change, see [Process Global Changes on page 90](#).

### > Delete audit tables globally

1. From the Administration page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Audit Tables**, select **Delete audit data**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. To delete all audit tables, select **All audit tables**.
8. To delete a specific group of audit tables from *Query*, select **Selected audit tables**. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
9. Under **Delete audit information older than**, filter the audit tables to delete by entering a time frame. For example, to delete audit tables older than three years, enter "3" in the first field and select "Year(s)" in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

10. Click **Save**. The global change process appears on the Global Changes page.
11. When you are ready to execute the global change, select it and click **Process global change**.

## Enable or Disable Audit Tables

Over time your database can accumulate numerous audit tables you no longer need. You can disable an audit table rather than permanently delete it. If you decide later to use it again, you can enable it.

### > Enable or disable audit tables

1. From the *Administration* page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Audit Tables**, select **Enable or disable audit tables**.
4. Click **OK**. The Add global change screen appears.

5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. To disable all audit tables, select All audit tables.
8. To disable a specific group of audit tables, select **Selected audit tables**. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
9. If you want to enable, rather than disable, audit tables, select **Enable**.
10. Click **Save**. The global change process appears on the Global Changes page.
11. When you are ready to execute the global change, select it and click **Process global change**.

## Delete Batch Control and Exception Reports

Over time your database can accumulate numerous batch control and exception reports you no longer need. To remove these from the database, create a batch control and exception report global change definition. After you create the definition, you can execute the global change process to remove the batch reports.

For more information about processing a global change, see [Process Global Changes on page 90](#).

### > Delete batch control and exception reports globally

1. From the Administration page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Batch Reports**, select **Batch control and exception report delete**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. To delete all batch control and exception reports for committed batches, select **All committed batches**.
8. To delete a specific group of batch control and exception reports from *Query*, select **Selected batches**. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
9. Under **Delete batch control and exception reports older than**, filter the reports to delete by entering a time frame. For example, to delete batch control and exception reports older than three years, enter "3" in the first field and select "Year(s)" in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

10. Click **Save**. The global change process appears on the Global Changes page.

11. When you are ready to execute the global change, select it and click **Process global change**.

## Delete Business Process Outputs

Over time your database can accumulate business process output files you no longer need. For example, in *Export*, the export generates output files in SQL tables that are available to download to a .csv file. To remove unneeded output files from the database, use the Delete business process outputs global change process. This process completely removes the SQL table(s) that hold output for the selected business processes.

**Note:** Not all business processes generate output files, but of those that do, only a few are addressed by this global change. This definition deletes outputs for these types of business processes: list segment imports; finder file imports; segmented house file imports; correspondence exports; marketing effort, acknowledgement, and tribute acknowledgement exports; and exports run using the *Export* feature in *Administration*.

For more information about processing a global change, see [Process Global Changes on page 90](#).

### > Delete business process outputs globally

1. From the Administration page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Business Process**, select **Business process output delete**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. To delete all process outputs, select **All business processes**.

**Note:** Not all business processes generate output files, but of those that do, only a few are addressed by this global change. This definition deletes outputs for these types of business processes: finder file imports, segmented house file imports, correspondence exports, marketing effort exports, and exports run using the *Export* feature in *Administration*.

8. To delete a specific group of process outputs, select **Selected business processes** and choose a selection of processes. To specify which types of output processes to include in the selection, on the Select filter and output fields tab of the query screen, set the **Name** field to equal the type(s) of output processes to include. For example, **Name** equals Finder File Import Process AND Marketing Effort Export Process will include only finder files and marketing efforts export files.
9. Under **Delete output tables generated by business processes older than**, enter a time frame. For example, to delete outputs older than three years, enter "3" in the first field and select "Year(s)" in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

10. Click **Save**. The global change process appears on the Global Changes page.
11. When you are ready to execute the global change, select it and click **Process global change**.

## Complete Pending Transfer through Global Change

When you transfer a child or project to a new sponsor, the new sponsorship status is pending until you complete the process. If you complete the process through **Global Change** you can define a time period you want to pass before the system automatically changes the sponsorships' statuses.

### > Complete pending transfers in Global Change

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select a global change definition appears.
3. Under **Sponsorship**, select **Complete pending transfers**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. If you want to base the change on just a specific site, in the **Site** field select the site you want changed.
7. In the **Parameters** frame, define the time period you want to wait before "pending" transferred are completed. For example, if you want to wait seven days, in the **Units** field enter "7" and in the **Period** field select "Day(s)."
8. In the **Selection** field, you can select a selection of records, created in *Query*, that you want updated. If you do not choose a selection, all pending transfers satisfying your parameter definitions are included in the change process.
9. Click **Save** to save the global change process and return to the Global Changes page.

## Adjust Sponsorship Rates

The billing coordinator for your organization may need to implement a global rate change in order to meet changes in the cost of maintaining the sponsorship. The **Adjust sponsorship rates** definition in **Global Change** allows you to globally increase or decrease the rate of sponsorships based on a % or fixed amount.

### > Adjust the sponsorship rates globally

1. From *Administration*, click **Global Changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Sponsorship, select **Adjust sponsorship rates**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process.



6. In the **Site** field, select the specific site you want changed. For example, if your organization maintains several offices - office A, office B, and office C - and you just want office B changed, select office B. Select **All sites** to change the amount in all locations.
7. If you want to globally change the rate set on a specific program, select **Program** and then in the drop-down menu select the specific program to use.
8. If you want to globally change the rate set on a specific group of records included in a selection created in Query, select **Selection**. Click the magnifying glass at the end of the field to access a search screen and locate the specific selection you want to use.
9. In the **Adjust method** field, you can choose to "Set rate to" a specific amount or to "Increase rate by" a specified amount.
10. In the **Amount** field, enter the new rate or the amount by which you want the existing rate increased. This depends on the option you selected in the **Adjust method** field.
11. In the **Revenue function** field, select the function you want to include on the record when recognizing the rate change. For example, if the new rate is for upgrades, select "Upgrade."
12. In the **Marketing fields**, modify the marketing information as desired.
13. Click **Save**.
14. When you are ready to execute the rate change, click **Process global change**.

## Cancel Expired Sponsorships

If when you created the sponsorship record, you entered an **Expiration date** to identify when you expect the sponsorship relationship to end, you can run a **Global Change** process and bulk cancel any expired fixed-term sponsorships.

### > Cancel expired sponsorships in bulk

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Sponsorship, select **Cancel expired sponsorships**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name for this global change process.
6. Click **Save**.
7. When you are ready to cancel the sponsorships, click **Process global change**.

For more information about the **Global Change** process, refer to the Global Change chapter in the *Administration Guide*.

## Unreserve Opportunity Reservation Keys in Bulk

If you have a large number of opportunities you want to unreserve at once, you can create a global change process. The global change process releases all reserved opportunities from multiple

reservation keys based on the **End date** entered in the key.

### > Unreserve opportunity groups in bulk

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Sponsorship**, select **Unreserve opportunity reservation keys**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name for this global change process.
6. Click **Save**.
7. When you are ready to unreserve the opportunities, click **Process global change**.

## Add Constituent Attribute

Attributes add flexibility to your record keeping by giving you the ability to define and store special information about a wide variety of record types. If after entering an attribute value in a number of records in your system you find you need to change the value, you can change all values at once with **Global Change** and a selection of the affected records. For example, if you have the attribute category "Athletics" and a value of "Soccer" but you need to change all "Soccer" values to "Football," you can use **Global Change** to make the change. You can also use the process to add new information to records. For example, if a constituent in the selection does not have an "Athletics" category included on his record but he is included in the record selection, the new data is added to the Attribute tab on his record.

### > Change attribute values globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Constituent, select **Add constituent attribute**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
- Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
- The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)

- On the Global Change page, an **Owner** column displays, so you can see who created the process
- 7. If you want to globally change attribute information on a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
- 8. In the **Category** field, select the attribute category that contains the value you want to change. All constituent attribute categories created in **Manage attribute categories** are available in this field.
- 9. In the **Value** field, enter the new value you want entered for the selected attribute **Category**.
- 10. In the **Comments** field, enter any note information you want to add to the constituent attribute. This information displays in the **Comment** column of the constituent's Attributes tab.
- 11. Select **Overwrite existing value** if you want the new value to replace the existing value. If you do not mark this checkbox, the new value is added to records with no existing value for the attribute category, but if the constituent does have a value entered for the selected attribute category, no new data is entered.
- 12. Select **Remove value from unqualified records** if you want the attribute value removed from records not qualified to receive the data.
- 13. Click **Save**.
- 14. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Add Constituent Mail Preference

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can add a mail preference to a selection of constituents or all constituents at once with **Global Change**. For example, if you have the mail type "Pledge Reminders," you can use **Global Change** to add a preference to send pledge reminders by email to a selection of constituents.

### > Add constituent mail preference globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Constituent, select **Add constituent mail preference**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally add a constituent mail preference for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the Mail type field, select the mail type preference that you want to add. For example, you can select "Appeals."
  9. Select **Send** or **Do not send**.
  10. If you select **Send**,
    - In **Send by**, select the method. For example, you can select "Mail" or "Email."
    - If you select "Mail," select **Send to seasonal address when valid** to change the address when there is a seasonal address and the mailing occurs in the date range for that season.
  11. In the **Comments** field, enter any note information you want to add to the constituent mail preferences. You can view comments in the **Mail Preferences** frame in the **Comments** column. The frame is on the constituent's Communications page on the Preferences tab.
  12. Click **Save**.
  13. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Add Constituent Site

Constituent sites allow you to associate locations with constituents. You can add a site to a selection of constituents or all constituents at once with **Global Change**. For example, if you have the constituent site "Northwest," you can use **Global Change** to add "Northwest" as a site to every constituent.

### > Add constituent site globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Add constituent site**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.

6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally add constituent sites for a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the Site field, select the constituent site that you want to add. All constituent sites created in Sites are available in this field.
  9. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Add Constituent Solicit Code

Solicit codes allow you to keep track of special considerations for contacting constituents. Solicit codes may include, "Do not solicit" or "Spring mailing only." If after entering a solicit code in a number of records in your system you find you need to change dates or comments, you can change all dates or comments at once with **Global Change** and a selection of the affected records. For example, if you have the solicit code "Do not solicit" and the start date for the solicit code needs to be "July 14, 2010," you can use **Global Change** to make the change. You can also use the process to add new information to records. For example, if a constituent in the selection does not have an solicit code included on his record but he is included in the record selection, the new solicit code is added to the his record.

### > Add or change solicit codes globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Add constituent solicit code**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally add solicit codes for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Solicit Code** field, select the solicit code that you want to add. All solicit codes created in **Manage solicit codes** are available in this field.
  9. In the **Start date** field, enter the new start date.
  10. In the **End date** field, enter the new end date.
  11. In the **Comments** field, enter any note information you want to add to the solicit code. This information displays in the **Comment** column of the solicit code.
  12. Click **Save**.
  13. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Add Relationship Manager

Your organization may assign a fundraiser to maintain your organization's relationship with a constituent. You can view these in the **Constituent relationship manager** section of the Constituencies tab of a Constituent record. You can add a relationship manager to a selection of constituents or all constituents at once with **Global Change**. For example, you can use **Global Change** to assign a fundraiser, "John Doe," as a relationship manager for every constituent.

### > Add relationship manager globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Add relationship manager**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally add the relationship manager to a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Manager** field, select a fundraiser. You can use the binoculars icon to look up fundraisers.
  9. Select **Remove value from unqualified records** to remove the relationship manager from constituent records not included in the **Selection**.
  10. Click **Save**.
  11. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Add User-defined Constituency

User-defined constituencies are defined by your organization. You can add a user-defined constituency to a selection of constituents or all constituents at once with **Global Change**. For example, if you have a user-defined constituency, "Online friend," you can use **Global Change** to add this constituency to a selection of constituents.

### > Add user-defined constituency globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Add user-defined constituency**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
- Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.

- The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally add a user-defined constituency to a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Constituency** field, select the type of constituency to assign to the constituent. The constituency defines why the constituent is in your database and the affiliation with your organization.
  9. Enter the date the constituency begins.
  10. Enter the date the constituency ends. If the duration of the constituency is undetermined, leave this field blank.
  11. Select **Overwrite existing value** to change the duration of the constituency to match your new global entries where the constituency already exists.
  12. Select **Remove value from unqualified records** to remove the constituency from records not included in the **Selection**.
  13. Click **Save**.
  14. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

## Change Relationship Manager

Your organization may assign a fundraiser to maintain your organization's relationship with a constituent. You can view these in the **Constituent relationship manager** section of the Constituencies tab of a Constituent record. You can change or remove a relationship manager from a selection of constituents or all constituents at once with **Global Change**. For example, you can use **Global Change** to change the relationship manager for a selection of constituents to "John Doe."

### > Change relationship manager globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Change relationship manager**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:



- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally change the relationship manager for a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Manager** field, select a fundraiser. You can use the binoculars icon to look up fundraisers.
  9. Select **Remove fundraiser** or **Change Fundraiser**. **Remove fundraiser** will remove the fundraiser as a relationship manager from all constituents or from the constituents in your selection.
  10. If you select **Change Fundraiser**, select a new fundraiser in the **Manager** field for that option. You can use the binoculars icon to look up fundraisers. **Change fundraiser** will change the relationship manager for all constituents or constituents in your selection that have the relationship manager in the first **Manager** field to the fundraiser in the second **Manager** field.
  11. Click **Save**.
  12. When you are ready to execute the changes, click **Process global change**.

## Delete Constituent Attribute

Attributes add flexibility to your record keeping by giving you the ability to define and store special information about a wide variety of record types. If after adding an attribute to a number of records in your system you find you need to delete it, you can do so all at once with **Global Change** and a selection of the affected records. For example, if you have the attribute category "Athletics" and you need to delete it from all constituents, you can use **Global Change** to make the deletion.

### > Delete constituent attribute globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Delete constituent attribute**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally delete an attribute from a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Category** field, select the attribute category to delete. All constituent attribute categories created in **Manage attribute categories** are available in this field.
  9. Click **Save**.
  10. When you are ready to execute the deletions, click **Process global change**.

## Add Site to Records

You can globally assign site to a group of records in your database to restrict who can see these records. After you create the definition, you can execute the global change process to assign the sites. For more information about processing a global change, see [Process a global change instance on page 91](#).

### > Add site to records globally

1. From the Administration page, click **Global Changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Site, select **Add site to records**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify this global change process.
6. You can restrict the use of the process to a specific site. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."

**Note:** The first **Site** field in this form allows you to restrict the global change process to one site. This is not the site that will be applied to the records when you run the global change.

7. Select the type of records you want to apply the global change to.
8. In the **Selection** field, indicate the specific group of records you want to globally change. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use.
9. In the **Action** field, select the action you want the global change to take.

For records that can only have one site, if they already have a site assigned you can replace it or delete it. If they do not have a site assigned, you can add it.

For records that can have more than one site, you can add site, delete and individual site, or delete all sites.

10. In the **Site** field, select the site you want to assign to your selection of records.
11. Click **Save**.
12. When you are ready to execute the additions, click **Process global change**.

## Delete Constituent Mail Preference

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can delete a mail preference from a selection of constituents or all constituents at once with **Global Change**. For example, if you have the mail type "Pledge Reminders," you can use **Global Change** to delete a preference to send pledge reminders by email from a selection of constituents.

### > Delete constituent mail preference globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Delete constituent mail preference**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.  
When you select a site and save the process:
  - Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally delete a constituent mail preference from a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
8. In the Mail type field, select the mail type preference that you want to delete. For example, you can select "Appeals."
9. Click **Save**.

10. When you are ready to execute the deletions, click **Process global change**.

## Delete Constituent Site

Constituent sites allow you to associate locations with constituents. You can delete a site from a selection of constituents or all constituents at once with **Global Change**. For example, if you have the constituent site "Northwest," you can use **Global Change** to delete "Northwest" as a site from every constituent.

### > Delete constituent site globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Delete constituent site**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. If you want to globally delete constituent sites for a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the **Site** field, select the constituent site that you want to delete. All constituent sites created in **Sites** are available in this field.
8. Click **Save**.
9. When you are ready to execute the deletions, click **Process global change**.

## Standardize Constituent Names and Addresses

From the Global data entry settings page in *Administration*, you can define data hygiene settings to standardize the format of constituent addresses and names when you add or edit a constituent record through batch, import, or the Add an individual or Add an organization screens.

With the data formatting options turned on, the program automatically formats text entered into constituent address and name fields according to the defined standardization rules. For example, when a user enters "3186 WEST MAIN STREET" in the **Address** field and then tabs to the next field, the program can automatically update the text to "3186 W Main St".

Standardization only applies to constituent records added after you turn on the global data entry settings. To standardize all existing constituent records, you must use the Standardize Constituent Names and Addresses global change process.

### > Standardize constituent names and addresses in a selection

1. From *Administration*, click **Global changes**. The Global Changes page appears.

2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Standardize constituent names/addresses**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Selection** field, choose a selection of constituents to update.
7. The bottom of the screen displays the constituent data hygiene settings currently defined on the Global data entry settings page in *Administration*. To standardize formats and correct capitalization, both settings must be turned on before you run the global change process. For more information about data hygiene settings, see the *Constituent Duplicates and Merge Tasks Guide*.
8. Click **Save**. You return to the Global Changes page.
9. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

**Warning:** The program uses the data hygiene settings defined when you start the global change process. If you schedule the process to run at a later time, make sure that you do not change the data hygiene settings in the interim period.

## Delete Constituent Solicit Code

Solicit codes allow you to keep track of special considerations for contacting constituents. Solicit codes may include, "Do not solicit" or "Spring mailing only." You can delete solicit codes from a selection of constituents or all constituents at once with **Global Change**. For example, if you have added the solicit code "Do not solicit" to many constituent records, you can use **Global Change** to delete it from all records that have that code.

### > Delete constituent solicit codes globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Delete constituent solicit code**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
- [Delete constituent solicit codes globally on page 109](#) Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.

- The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally delete solicit codes from a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  8. In the **Solicit Code** field, select the solicit code that you want to delete. All solicit codes created in **Manage solicit codes** are available in this field.
  9. Click **Save**.
  10. When you are ready to execute the deletions, click **Process global change**.

## Delete User-defined Constituency

User-defined constituencies are defined by your organization. You can delete a user-defined constituency from a selection of constituents or all constituents at once with **Global Change**. For example, if you have a user-defined constituency, "Online friend," you can use **Global Change** to delete this constituency from a selection of constituents.

### ➤ Delete user-defined constituency globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Delete user-defined constituency**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.  
When you select a site and save the process:
  - Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally delete a user-defined constituency from a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

8. In the **Constituency** field, select the type of constituency to delete from the selected constituents. The constituency defines why the constituent is in your database and the affiliation with your organization.
9. Click **Save**.
10. When you are ready to execute the deletions, click **Process global change**.

## Set All Constituent Mail Preferences

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can set all mail preferences for a selection of constituents or all constituents at once with **Global Change**. For example, if you have the mail type "Pledge Reminders," you can use Global Change to add a preference to send pledge reminders by email to a selection of constituents.

### > Set all constituent mail preferences globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Set all constituent mail preferences**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.  
When you select a site and save the process:
  - Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. If you want to globally set all constituent mail preferences for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
8. Select **Overwrite existing mail preferences** to replace the constituent mail preferences with these new preferences. If you do not select this, the new preferences will be added to the existing ones.
9. Select **Send** or **Do not send**.
10. If you select **Send**,

- In **Send by**, select the method. For example, you can select "Mail" or "Email."
  - If you select "Mail," select **Send to seasonal address when valid** to change the address when there is a seasonal address and the mailing occurs in the date range for that season.
11. In the **Comments** field, enter any note information you want to add to the constituent mail preferences. You can view comments in the **Mail Preferences** frame in the **Comments** column. The frame is on the constituent's Communications page on the Preferences tab.
  12. Click **Save**.
  13. When you are ready to execute the changes, click **Process global change**.

## Refresh Search Constituents

When you add and edit constituents and their addresses, certain pieces of data are stored in a table to be used for duplicate constituent matching. The constituent matching algorithm uses these during the duplicate matching process when you add new constituents. The Refresh Search Constituents global change refreshes and repopulates this information for optimal duplicate matching. You should not need to run this process under normal data entry circumstances. For more information about the duplicate matching process and algorithm, see the *Constituent Duplicates and Merge Guide*.

## Refresh Event Registration Campaigns on Payments

Events are often associated with a campaigns. With this Global Change definition, you can update event payments with a campaign.

### > Globally add campaigns to payments for events with campaigns

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Fundraising Efforts - Campaigns**, select **Refresh event registration campaigns on payments**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
- Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
- The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)



- On the Global Change page, an **Owner** column displays, so you can see who created the process
7. In the **Event** field, select the event to which you want to add campaigns to payments.
  8. Click **Save**.
  9. When you are ready to execute the changes, click **Process global change**.

## Refresh Membership Program Campaigns on Payments

Membership programs are often associated with a campaigns. With this Global Change definition, you can update event payments with a campaign.

### > Globally add campaigns to payments for membership programs with campaigns

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Fundraising Efforts - Campaigns**, select **Refresh membership program campaigns on payments**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. In the **Membership program** field, select the program to which you want to add campaigns to payments.
  8. Click **Save**.
  9. When you are ready to execute the changes, click **Process global change**.

## Manage Purpose or Designation Information

You use designations and fundraising purposes to track the reasons your organization raises money and how your donors' gifts should be used. At times, you may need to add, edit, or delete fields

associated with designations and fundraising purposes. To do this, you can change all values at once with **Global Change** and a selection of the affected records.

### > Manage fundraising purpose or designation information globally

1. From the *Administration* page, click **Global Changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Fundraising Efforts - Purposes and Designations, select Manage purpose or designation information.
4. Click OK.
5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.
6. You can restrict the use of the process for a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. In the Record type field, select the type of records you want to change. You can select "Designation" or "Fundraising Purpose."
8. If you want to globally change attributes for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

**Note:** A selection is a named set of IDs of the same record type. It has a name and description and is often used as input into a process, such as the terminate sponsorship process, as a means to specify which set of records should be acted on by that process. Because selections consist only of IDs (rather than output fields), they are optimized for peak processing speed. You create selections in Query, accessed through Analysis.

9. In the Available field options grid, select any fields you want to edit during the global change process. Click the right arrow to move the fields to the Selected fields grid.
10. Fields that remain in the Available field options grid are not included in the global change process.
11. For any fields you include in the Selected fields grid, select an action and a new value. The following actions are available:
12. Add value if it does not exist - Adds the new value to the specific field you select.
13. Add value if it does not exist and overwrite existing values - Adds the new value to the specific field you select. If a value currently exists for the specific field, the existing value is overwritten with the new value you select. All records in the selection will have this new field value.
14. Delete value if it exists - Deletes the existing value from the field you select.
15. To add new entries to the New Value field, enter your new entry and click tab on your keyboard.
16. Click **Save**.

17. When you are ready to execute the additions, click Process global change.

## Retag Revenue Split Records with New Campaign

Fundraising revenue is associated with a campaign. You can change the campaign and subpriorities for multiple records at once with a global change. For example, you can retag all revenue associated with an annual campaign to be associated with a disaster relief campaign.

### > Retag revenue split records with new campaign globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Fundraising Efforts - Campaigns**, select **Retag revenue split records with new campaign**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.  
When you select a site and save the process:
  - Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. In the **Source campaign** field, select the campaign to retag in revenue records. This campaign appears on the Campaigns tab of a Revenue page. The target campaign will replace the source campaign in revenue records.
8. In the **Target campaign** field, select the new campaign.
9. In the **Subpriority mapping grid**, select the source subpriorities to retag.
10. In the Subpriority mapping grid, select a target subpriority for each source subpriority. These will replace the source subpriorities. If you do not select a subpriority, the goal will map without one.
11. Click **Save**.
12. When you are ready to execute the changes, click **Process global change**.

## Set Recurring Gift Status

You can change the recurring gift status for all revenue records or a selection of them. For example, if all of your constituents have paid for all of their recurring gifts, then you can globally update the recurring gift status for all revenue records to "Completed."

### › Set recurring gift status globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Revenue**, select **Set recurring gift status**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
7. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen)
  - On the Global Change page, an **Owner** column displays, so you can see who created the process
8. If you want to globally set the recurring gift status for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
  9. In the **Status** field, select the status to apply to the recurring gift.

- Active – To reactivate a held or completed recurring gift, select “Active”. You can apply payments to an “active” recurring gift.
- Held – To make a recurring gift temporarily inactive, such as if the constituent requests to temporarily stop the recurring gift, select “Held”. You cannot apply payments to a “held” recurring gift.
- Terminated – If the constituent requests to stop a recurring gift entirely, select “Terminated”. A “terminated” recurring gift is no longer active in the database, and you cannot apply payments to it.
- Completed – If the constituent makes all payments for a recurring gift, select “Completed”. A “completed” recurring gift is no longer active in the database, and you cannot apply payments to it.

10. Click **Save**.

11. When you are ready to execute the changes, click **Process global change**.

### > Map marketing plan task owners to staff members globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Marketing**, select **Map marketing plan task owners to staff members**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Parameters** grid, enter the task owners and staff members that you want to map.
7. Click **Save**.
8. When you are ready to execute the changes, click **Process global change**.

## Credit Card Conversion

To help you comply with PCI DSS, the program no longer stores complete credit card numbers in your database. To securely store sensitive credit card and merchant account information, the program now uses the Blackbaud Payment Service (BBPS) web service. You should only run this global change as a part of the upgrade procedure to BBPS.

### > Change credit cards globally

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Revenue**, select **Credit card conversion**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. Click **Save**.

7. When you are ready to execute the changes, click **Process global change**.

## Set Recognition Credit Type

This global change definition allows you to change the recognition credit type currently associated with a group of existing recognition credits you saved to a query selection. You can change the credits to match the system default recognition or a selected recognition type.

### > Change revenue recognition credit types globally

1. From *Administration*, click **Global Changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Revenue**, select **Set recognition credit type**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen).
  - On the Global Change page, an **Owner** column displays, so you can see who created the process.
7. In the **Selection** field, you must select a selection of records, created in *Query*, that you want updated. Only **Revenue recognition credit** query types can be used.
  8. In the **Set recognition type** section, you can choose to change recognition credit types **Based on system configuration** or to a specific type. To change to a specific type, select **To this type** and select the type from the drop-down menu.
  9. Click **Save**.
  10. When you are ready to execute the changes, click **Process global change**.

## Address Geocodes

Before an address can be mapped, it must have a geocode. You can assign geocodes when you create new records or import records into the system. For existing records, we recommend you use the global change functionality to assign geocodes.

### > Add address geocodes

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Add Global Change Instance screen appears.
3. Select **Address Geocode** and click **OK**. The Add global change screen appears.
4. Enter a unique name and selection for the global change. If necessary, click the binoculars to locate an existing selection of records.
5. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen).
  - On the Global Change page, an **Owner** column displays, so you can see who created the process.
6. Select whether to process only primary addresses in the global change.
  7. Click **Save**. You return to the Global Changes page.
  8. To process the records, select the global change you created and click **Process global change**.

## Set Auto-Calculate Realized Amount

When you add a planned gift, you select its applicable vehicle such as charitable gift annuity or bequest. On the Planned Giving tab, you can view and manage the options for your planned gift vehicles.

For each vehicle type, you can select whether to automatically calculate the realized amount as your organization receives revenue toward a planned gift. However, if you select to automatically calculate the realized amount for a planned gift vehicle, users can disable the automatically calculated amount for a planned gift if necessary.

With the Set auto-calculate realized amount global change, you can set a selection of planned gifts to have the realized amount auto-calculated, rather than manually changing it on each planned gift.

### > Globally set auto-calculate realized amounts for planned gifts

1. From the Administration page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Major Giving - Planned Gifts, select **Set auto-calculate realized amount**.
4. Click **OK**.

5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. In the **Selection** field, select the group of planned gifts and mark **Auto-calculate realized amount**.
8. Click **Save**.
9. When you are ready to execute the changes, click **Process global change**.

## Auction Donation Write-offs

After an auction event is held, you can write-off any items that were not sold, expired, or have been lost. To write-off multiple items at one time, we recommend you use the global change functionality.

### > Write-off auction donations

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Add Global Change Instance screen appears.
3. Select **Auction donation write-off** and click **OK**. The Add global change screen appears.
4. Enter a unique name for the global change.
5. In the **Site** field, select the site that you want to use to secure the global change instance. Only sites you have rights to appear in this field.

When you select a site and save the process:

- Only users with access to the selected site can run the global change process.
  - Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.
  - The site appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can open this screen).
  - On the Global Change page, an **Owner** column displays, so you can see who created the process.
6. Enter a selection for the global change. Click the binoculars to locate an existing selection of records.

**Tip:** Rather than use a selection of records, you can click **Auction** and select an auction for the global write-off of auction donations. This only write-offs auction donations related to the selected auction.

7. Select the GL post status and post date for auction donations write-offs.
8. In the **Recognition credits** field, select how recognitions credits should be handled as a result of the write-off.
9. In the **Reason code** field, select the reason why the write-offs occurred.
10. Enter further information you would like to include in the **Details** field.



11. Click **Save**. You return to the Global Changes page.
12. To process the records, select the global change you created and click **Process global change**.

## Unlock Sponsorship Sales Orders

This global change definition is designed for you to run on a daily basis. It unlocks any sponsorship opportunities whose sales orders have expired. When a sponsor selects an opportunity on your website, a sales order item is created and the opportunity itself becomes reserved. This reservation comes with an expiration date. When the date passes, this global change releases them so they become available to other sponsors.

### > Unlock sponsorship sales orders

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select global change definition screen appears.
3. Under **Sponsorship**, select **Unlock sponsorship sales orders**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. Click **Save** to save the global change process and return to the Global Changes page.

## Unlock Sponsorship Opportunities

This global change definition is designed for you to run on a daily basis. It releases opportunities inadvertently locked by an operation or process that may not have cleanly closed. For example, if during the unreserve process your system times out leaving a number of opportunities that you intended to unlock locked, this global change completes the process.

### > Unlock sponsorship opportunities

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select global change definition screen appears.
3. Under **Sponsorship**, select **Unlock sponsorship opportunities**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name field**, enter a name to identify your global change process.
6. If you want to base the change on just a specific site, in the **Site** field select the site you want changed.

7. In the **Timeout (in minutes)** field, select how old the lock should be before it is released by the global change. For example, if you select 15 minutes, only locks that occurred in the past 15 minutes are released. If the lock occurred 13 minutes ago, it is not included in the process.
8. Click **Save** to save the global change process and return to the Global Changes page.

## Clean Up Inactive Prospect's Interactions

This process cancels any pending or planned prospect plan steps associated with an inactive prospect. The steps are not deleted, but they are marked as canceled.

### › Clean up inactive prospect's interactions

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select global change definition screen appears.
3. Under **Constituent**, select **Cleanup inactive prospect's interactions**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
7. Click **Save** to save the global change process and return to the Global Changes page.

## Update Membership Status

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.

# Organization Hierarchy

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Add Positions .....	<b>126</b>
Add Fundraiser to Existing Position .....	<b>127</b>
Replace Fundraiser in Hierarchy .....	<b>128</b>
Edit Position Information .....	<b>129</b>
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The **Manage organization hierarchy** feature in *Administration* helps you create tools to better view and analyze the fundraising performance of a specific group of fundraisers. With this functionality, the system administrator (or any user granted the necessary permissions) defines the organization’s internal structure and creates teams useful to other users of the application. For example, the organization hierarchy created in the feature includes Researcher and Primary Solicitor positions. The performance of both positions is of interest to the Major Giving Director, so the system administrator creates a Major Giving team that includes both positions. The Major Giving Director can then use the team to generate reports, dashboards, or KPIs and track the Researcher and Primary Solicitor performance.

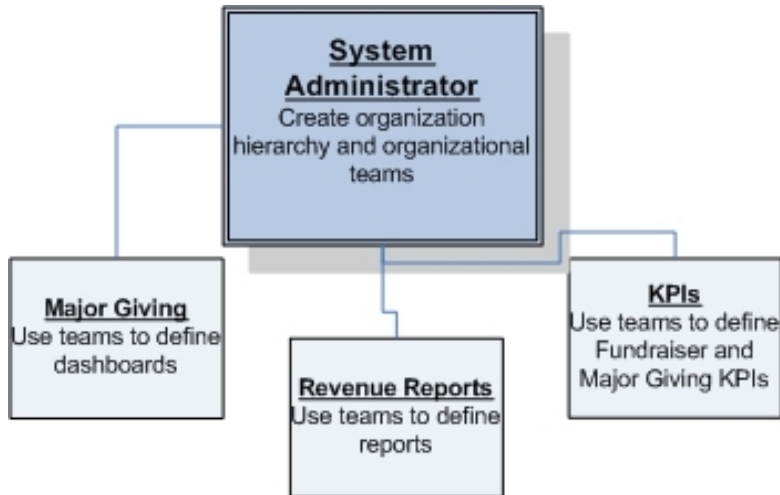
The hierarchy created in the application clearly defines and displays the relationships between the various positions; however, individuals in your system are not inextricably linked to the positions. This allows the structure and relationships established in the hierarchy to remain unchanged even when individuals holding the positions move on. For example, your organization includes a Northwest Planned Giving Director position in its hierarchy, and Arthur Andrews currently holds this position. If next year Arthur leaves your organization, the position Northwest Planned Giving Director remains in the hierarchy even though Arthur left. The application keeps the position intact even after you remove Arthur from your system. If a replacement is immediately known, you can assign the new individual to the position or leave the position vacant.

## Implications and Uses of Hierarchy

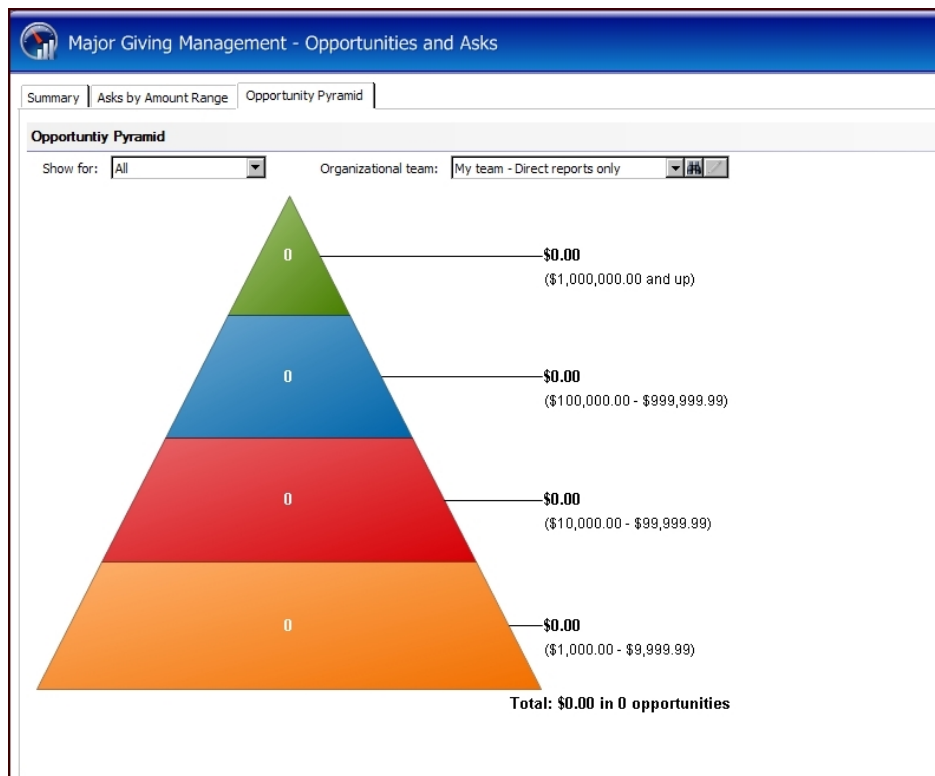
The organization hierarchy and organizational teams created from the hierarchy help application users to better track major giving data and fundraising performances based on positions. Fundraising

managers can track fundraising activities for entire teams of fundraisers instead of just by individual fundraisers.

Once the hierarchy and teams are in place, fundraising managers can create dashboards in *Prospects*, reports in *Revenue*, and KPI instances in **KPIs**, filtering the data included in the various output formats based on the organizational teams created in **Manage organization hierarchy**.



**Major Giving:** Using the **Prospect Analysis Dashboard** functionality, users can filter dashboard results generated in **Fundraisers and steps, Proposals, and Opportunities** based on a selected organizational team created in **Manage organization hierarchy**. An **organizational team** field is included as a filter in all *Prospects* dashboards. For more information, see the *Prospects Guide*.



**KPIs:** Using either a Fundraiser or Major Giving KPI definition, users can filter KPI results based on an organizational team created in **organization Hierarchy**. An **organizational team** field is included as a filter on the Parameters tab of the KPI Instance screen.

The screenshot shows a web form titled "Parameters" for a KPI instance. The main heading is "Total Revenue Raised for a Designation". Below this, it says "Total the amount raised for this designation:". The form includes the following fields:

- Designation: ANNUAL
- Organizational team: Southeast Division (Smart Query) (This field is circled in red in the image)
- Appeal: ANNUALMAIL
- Report code: (empty)
- Business unit: Team Fundraising
- Start date: 1/1/2008

## Access Organization Hierarchy

You access the **Manage organization hierarchy** function from the Administration page. Only authorized users can open **Manage organization hierarchy** and create and edit the hierarchies.

### ➤ Access the Organization Hierarchy page

1. From the action bar, click **Administration**, organization hierarchy. The Organization Hierarchy page appears. Your organization's name defaults as the top node.

**Note:** If the application cannot derive your organization's name from the database stamp, "organization" displays instead.

2. From this page, authorized users can create and edit your organization's hierarchy, defining multiple organizational teams. For detailed instructions about working on the Organization Hierarchy page, see the following sections:

- [Manage an Organization Hierarchy on page 125](#)
- [Manage Organizational Teams on page 132](#)

## Manage an Organization Hierarchy

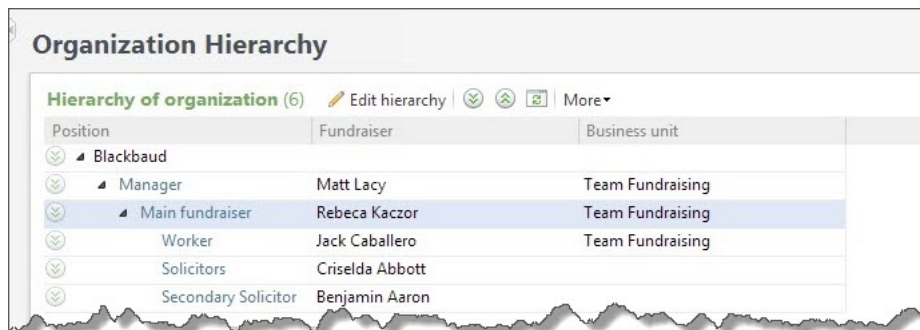
When you first open the Organization Hierarchy page, the application displays only your organization's name. From this default node, you add the additional branches to your hierarchy.

In addition to defining your organization's internal structure, you can assign fundraisers to the various positions, or if the position is not currently filled, you can leave it vacant. After your hierarchy is in place, you can return at any time to add new positions, assign fundraisers to new or existing positions, and edit or delete existing information.

## Add Positions

A position is a discrete unit in an organization representing jobs, roles, or functions commonly held by one person. A position may represent a manager, a fundraiser, a gift officer, or similar type job description. Although positions are usually held by an individual, in the hierarchy you can add positions without assigning individuals. For example, if the position is currently vacant, you can still add the position even though no one holds the job. You may also use positions to designate the name of a team and never assign a specific individual. For example, you can create a “Northeast Region” position that houses all positions available in your northeast office.

In the organization’s hierarchy, positions are represented by nodes. In the example below, the “Northeast Director” node represents a parent position in the Blackbaud Demo organization. Within this parent position, there are two children positions: “Researcher” and “Development Officer”. If need be, you can add children positions to the children positions. For instances, you can add an “Assistant Researcher” position under the “Researcher” position.



**Organization Hierarchy**

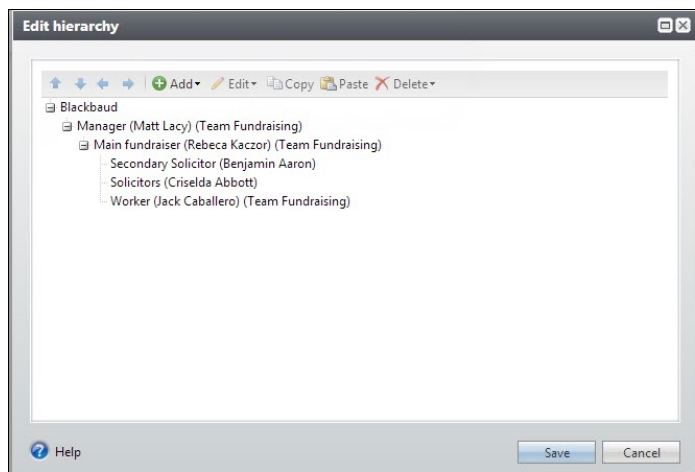
Hierarchy of organization (6) Edit hierarchy | More

Position	Fundraiser	Business unit
Blackbaud		
Manager	Matt Lacy	Team Fundraising
Main fundraiser	Rebeca Kaczor	Team Fundraising
Worker	Jack Caballero	Team Fundraising
Solicitors	Criselda Abbott	
Secondary Solicitor	Benjamin Aaron	

Groups of interrelated positions, such as the “Northeast Director” or “Southeast Director” nodes in the example above, are known as business units. Business units usually represent fundraising teams, managerial divisions (Major Giving, Planned Giving), and geographic divisions (regional offices).

### > Add a position to your organization’s hierarchy

1. From the Organization Hierarchy page, click **Edit Hierarchy**. The Edit Hierarchy screen appears.



2. Click **Add** and select "Position." The Add position screen appears.

3. In the **Position title** field, enter the name of the position as you want it to appear in your hierarchy.
4. You can specify a business unit for the position, so you can report on performance based on business units.
5. In the **Site** field, enter the site in your organization to which the position is associated.  
If the position is a child node, the **Site** information entered in the parent node defaults. In addition, if you change the **Site** information in the parent node, all child nodes automatically change to the new **Site**.

**Note:** Administrators can set up security access based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this position as soon as you click **OK**.

6. In the **Fundraiser** field, enter the name of the fundraiser, if any, assigned to the position. If no one is assigned the position, leave this field blank. To access the Fundraiser Search screen and locate the fundraiser in your database, click the binoculars at the end of the field.
7. If you enter a **Fundraiser**, you must enter a **Start date** for the fundraiser.
8. Click **OK** to save the new position and return to the Edit Hierarchy screen. The new position appears in your hierarchy.

**Note:** Once you create a position or a branch, you can use the **Copy** and **Paste** functionality to save time creating additional positions and branches. For more information, see [Copy and Paste Positions and Branches on page 131](#).

9. When you finish adding positions to your hierarchy, click **Save** on the Edit Hierarchy screen. Your hierarchy is saved, and you return to the Organization Hierarchy page.

## Add Fundraiser to Existing Position

If after you create a position, you have to either change the fundraiser originally associated with the position or add a fundraiser to a position that currently has no fundraiser assigned, you can easily do so from the Edit Hierarchy screen.

### ➤ Add a fundraiser to an existing position in your hierarchy

1. From the Organization Hierarchy page, click **Edit Hierarchy**. The Edit Hierarchy screen appears.



2. In the hierarchy, select the position to assign to a fundraiser.
3. Click **Add** and select "Fundraiser". The Add Fundraiser screen appears.

4. In the **Replace with** field located in the **Fundraiser information** section, enter the name of the fundraiser to be associated with this position. Click the binoculars at the end of the field to access the Fundraiser Search screen and search your database for the fundraiser.
5. In the **Start date** field, enter the date the selected fundraiser assumed the position. The **Start date** cannot be equal to or later than the system date.
6. Click **OK**. You return to the Edit Hierarchy screen. The new fundraiser's name appears next to the selected position.

## Replace Fundraiser in Hierarchy

When you create a position in your organization hierarchy, you have the option of assigning a fundraiser to the position; however, normal turnover within an organization will require you to occasionally change the fundraiser assigned various positions. When necessary, you can do so easily from the Organization Hierarchy page.

### ➤ Replace the fundraiser assigned to a position

1. From the Organization Hierarchy page, select the position for which you need to change the assigned fundraiser.



2. Click **Replace fundraiser**. The Add Fundraiser screen appears, displaying the position **Title**, **Site**, current **Fundraiser**, and the **Start date** of the current fundraiser.

**Note:** You can also replace a fundraiser from the Edit Hierarchy screen. From this screen, select the position for which you need to change the assigned fundraiser, click **Add**, and select "Fundraiser". The Add Fundraiser screen appears, and you can continue from step 3 in this procedure.

3. In the **End date** field, enter the date on which the current fundraiser's assignment to the position ends. The **End date** cannot be equal to or later than the system date.
4. In the **Replace with** field located in the **Fundraiser information** section, enter the name of the fundraiser to be associated with this position. Click the binoculars at the end of the field to access the Fundraiser Search screen and search your database for the fundraiser.
5. In the **Start date** field, enter the date the selected fundraiser assumed the position. The **Start date** cannot be equal to or later than the system date.
6. Click **Save**. You return to the Organization Hierarchy page.

## Edit Position Information

When you create positions in your organization hierarchy, you must enter the **Position title**, which displays in the hierarchy, and if necessary, you can enter **Site** information, identifying the location of the position. If after entering this information, you discover an error or for any other reason need to change the **Position title** or **Site**, you can do so from either the Edit Hierarchy screen or the Organization Hierarchy page.

### ➤ Edit position title or site information

1. From either the Organization Hierarchy page or the Edit Hierarchy screen (accessed by clicking **Edit Hierarchy** on the Organization Hierarchy page), select the position for which you need to change information.
2. Click **Edit** and select "Position". The Edit Position screen appears.

3. In the **Position title** field, enter the title. The title displays in the organization hierarchy.
4. You can edit the business unit the position is associated with.
5. In the **Site** field, enter the site in your organization to which the position is associated.

If the position is a child node, the **Site** information entered in the parent node defaults. In addition, if you change the **Site** information in the parent node, all child nodes automatically change to the new **Site**.

**Note:** Administrators can set up security access based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this position as soon as you click **OK**.

6. Click **Save** to save the new position information and close the Edit Position screen.

## Edit Fundraiser Start Date

When you assign a fundraiser to a position in your organization hierarchy, you must enter the date the fundraiser started at the position. If after entering this information, you discover an error or for any other reason need to change the **Start date**, you can do so from either the Edit Hierarchy screen or the Organization Hierarchy page.

### > Edit the fundraiser start date

1. From either the Organization Hierarchy page or the Edit Hierarchy screen (accessed by clicking **Edit Hierarchy** on the Organization Hierarchy page), select the fundraiser position for which you need to change the **Start date** information.
2. Click **Edit** and select "Fundraiser start date". The Edit Fundraiser Start Date screen appears.

3. In the **Start date** field, enter the new date.
4. Click **OK**. You return to the Organization Hierarchy page or the Edit Hierarchy screen.

## Copy and Paste Positions and Branches

The **Copy** and **Paste** functionality allows you to replicate a single position or an entire branch of your hierarchy. For example, if your organization has two divisions, Northeast and Southeast, and the positions are exactly the same in both divisions, you can create the Northeast division, copy the division when it is complete, and paste a replica of the entire Northeast branch to a new location on your hierarchy. You then can edit the branch name, make structural changes needed, and assign fundraisers to the positions, rather than create the entire Southeast branch from scratch.


When you copy a branch or position, any subordinate nodes are also copied. **Site** and **Fundraiser** information is not copied.

### > Copy and paste positions and branches in your organization hierarchy

1. From the Organization Hierarchy page, click **Edit Hierarchy**. The Edit Hierarchy screen appears.
2. In the hierarchy, select either the single position or the top position of the branch you want to copy.
3. Click **Copy**.
4. Select the location to which you want to paste the copied position or branch. For example, if you are creating a new branch off the primary organizational node, select the organization's name.
5. Click **Paste**. The copied branch or position appears in the selected location.

## Show Position History

To view the history of a position, on the Organization Hierarchy page, click the position title. The Organization Position History page appears.

Manage Organization Hierarchy		
Organization Position History		
Position title: Manager		
Business unit: Team Fundraising		
Site:		
Position history (2)  More ▾		
Fundraiser	Start	End
Julian Dabbs	4/11/2011	6/26/2013
Matt Lacy	6/27/2013	

From this page, you can view the different individuals assigned the position, and vacancy information, and dates associated with the various assignments.

## Manage Organizational Teams

An organizational team is a selected group of positions in the hierarchy for which development managers usually want to analyze fundraising or performance data. Teams can represent development teams or any logical group of related positions for which a manager wants to view information. You can mix and match positions from anywhere in the hierarchy when creating a team.

In addition, a position can be a member of multiple teams. For example, you can create separate Northeast and Southeast teams, and then create an East team that includes all positions included in the Northeast and Southeast teams.

**Note:** Security rights determine who can add, edit, and delete organizational teams. The teams defined in **Organization Hierarchy** are available for use to authorized development managers and administrators for the purpose of generating reports, KPIs, and dashboards.

### > View members of an organizational team

1. From the Organization Hierarchy page, in the **Tasks** pane on the left side of the page, click **Manage organizational Teams**.

The Information library appears, displaying the Queries tab.

2. Search for the team's smart query in the list and then click the name of the query to open.

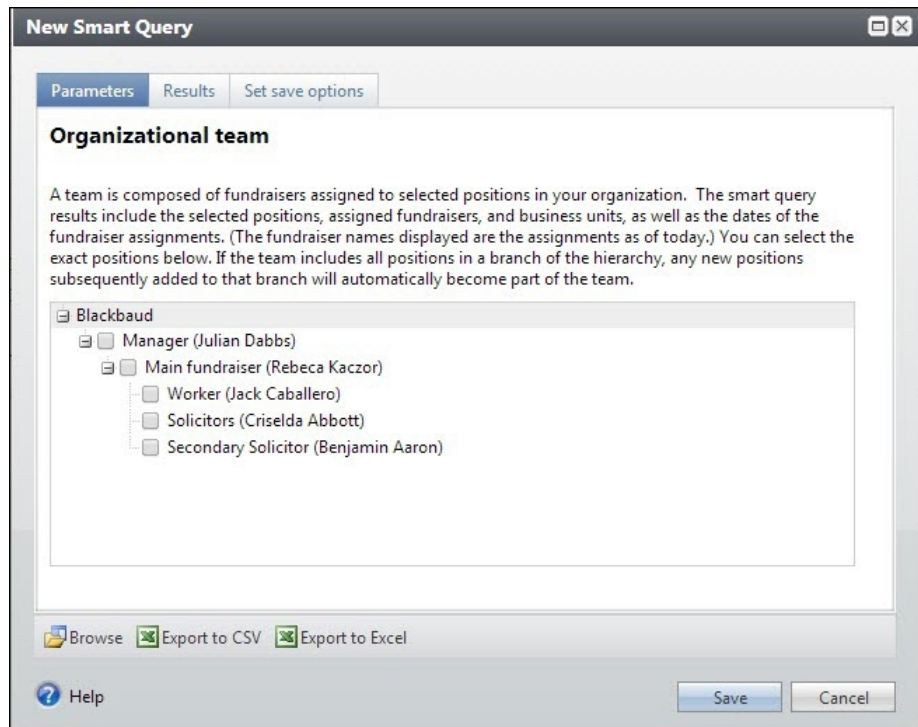
**Tip:** To help find a team query, sort by Organization Position Holder in the **Record type** column.

3. The Smart query page opens. Under Results, click **Click here to process the query and view the results**. The grid displays all members of the team and lists their position title, assigned fundraiser, start date, end date, and business unit.

Once you have a team query in place, you use the query to filter information included in reports, dashboards, and KPIs, allowing you to track information specific to the individual positions.

## > Define an organizational team

1. From the Organization Hierarchy page, under **Tasks**, click **Manage organizational Teams**. The Information library appears, displaying the Queries tab.
2. Click **Add a smart query**. The Smart Query Definition screen appears.
3. Under **Organization Position Holder**, select "Organization Positions" and click **OK**. The Organizational Team screen appears, displaying the Parameters tab.

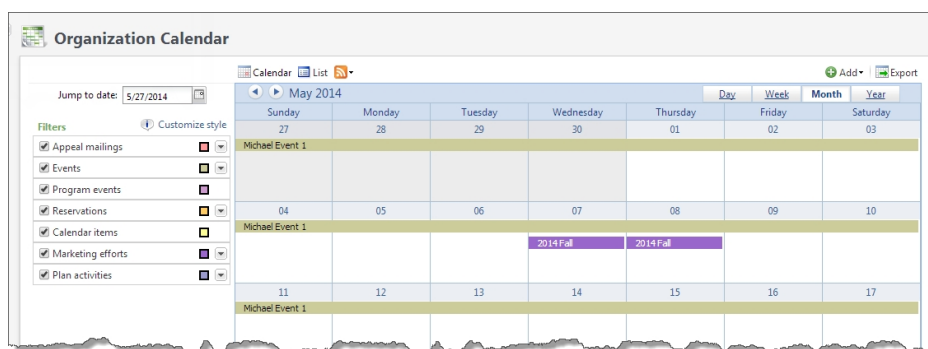


4. Select the checkbox for each position you want to include in the team.
5. Select the Results tab. This tab provides a preview of the records included in the query so you can quickly browse to make sure the query is running as intended. Only the first 500 rows of results are returned since this tab is intended for you to verify your query criteria, not as a means to view every record included in the result set.
6. Select the Set options tab. On this tab, you can enter a unique name and description to help identify the query. You can specify the properties of the query and select whether to create a selection based on the query. You can also set additional options, such as whether to include the query in a folder or add it to the Favorites folder. For more information about the Set options tab, see the *Query and Export Guide*.
7. Click **Save**. The smart query page appears where you can process the query to view the full results.

# Organization Calendar

<b>View the Organization Calendar</b> .....	<b>134</b>
<b>Add Items to the Organization Calendar</b> .....	<b>135</b>
<b>Export the Organization Calendar</b> .....	<b>136</b>

On the Organization Calendar page, you can view scheduled items and activities related to your organization or community to help schedule and coordinate activities and processes. From the organization calendar, you can add and manage calendar items such as holidays, community events, or scheduled breaks in your organization's operation. You can also view and manage activities, such as events or communications, scheduled during a specific period of time. To access the Organization Calendar page, in *Administration*, click **Organization calendar**.



## View the Organization Calendar

The Organization Calendar page displays the calendar in two views. The calendar view displays a traditional calendar grid view. Click **List** to view all scheduled items in a list. In both views, you can

- To view the dates on the calendar in a daily, weekly, or yearly format, click the interval to use above the calendar. Use the left and right arrows to view an earlier or later day, week, month, or year.
- To view the items and activities for a specific date, in the **Jump to date** field, select the date to view.
- Under **Filters**, you can select the types of items and activities to view on the calendar. To hide a type of item or activity, clear its checkbox. To help you navigate through the information on the calendar, each type of calendar item or activity is color-coded. To adjust the color of an item type, click **Customize style**.

- After you select the types of activities to view, you can apply filters to further define which activities appear. Click the down arrow next to the activity type and select the criteria of the items to view. The calendar updates to display the activities that meet the selected criteria.
- To view more information about an event, appeal mailing, marketing effort, or plan activity, right-click and select **Go to [irecord type]**. In the calendar view, you can also hover your mouse over a calendar item to view a brief description.
- To receive notifications as a Really Simple Syndication (RSS) feed through your browser or reader such as Microsoft *Outlook*, click **View RSS feed**. You can select to receive notifications when new events and calendar items are added.
- When events, appeal mailings, marketing efforts, or plan activities are scheduled in the program, they appear automatically on the organization calendar. You can also add new activities directly from the calendar, as well as other calendar items. For more information, see [Add Items to the Organization Calendar on page 135](#).
- After you add items and activities to the organization calendar, you can export the calendar, such as for use with a calendar on a mobile device. For information about how to export the calendar, see [Export the Organization Calendar on page 136](#)

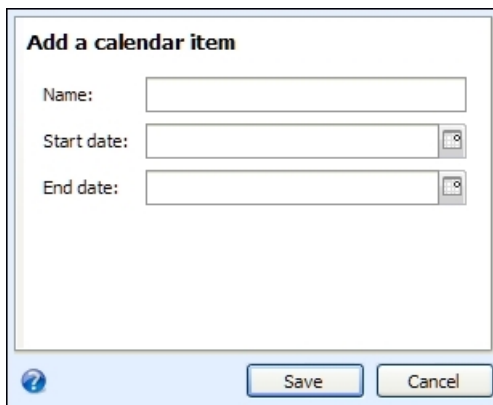
## Add Items to the Organization Calendar

From the Organization Calendar page, you can add and manage items to keep track of important dates or occasions such as holidays and community events.

When events, appeal mailings, marketing efforts, or plan activities are scheduled in the program, they appear automatically on the organization calendar. You can also add new activities directly from the calendar page.

### ➤ Add a calendar item

1. From *Administration*, click **Organization calendar**. The Organization Calendar page appears.
2. Click **Add** and select **Calendar item**. The Add a calendar item screen appears.



The screenshot shows a dialog box titled "Add a calendar item". It contains three input fields: "Name:", "Start date:", and "End date:". Each date field has a small calendar icon to its right. At the bottom, there are "Save" and "Cancel" buttons.

3. Enter a name for the item, such as St. Patrick's Day or Downtown Arts Expo.

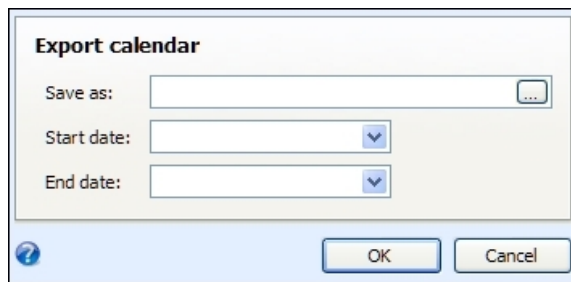
4. In the **Start date** and **End date** fields, select the duration of the item. When you add the item from the calendar view, the date range selected on the calendar automatically appears.
5. Click **Save**. You return to the Organization Calendar page. On the selected dates, the new item appears.

## Export the Organization Calendar

After you add items and activities to the organization calendar, you can export the calendar to an iCalendar (\*.ics) or a vCalendar (\*.vcs) file. With the export file, you can view and manage the items or activities in a calendar outside of the program, such as in Microsoft *Outlook* or on a mobile device. When you export the calendar, you select the date range of the items and activities to export.

### > Export the organization calendar

1. From *Administration*, click **Organization calendar**. The Organization Calendar page appears.
2. On the Calendar tab, click **Export calendar**. The Export calendar screen appears.



3. In the **Save as** field, click the ellipsis, and browse to the location to save the export file.
4. Specify the name and format to use to save the export file. You can save the export file as either an iCalendar (\*.ics) or a vCalendar (\*.vcs) file.
5. Click **OK**. When the program saves the export file at the designated location, a message appears.
6. Click **OK**. You return to the Organization Calendar page.



# Smart Fields

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Smart fields provide quick access to specific information that otherwise might take hours or days to compile. For example, you create a query of all donors in your database who gave \$10,000, along with their first gift date. You routinely run this query, which takes a considerable amount of time to execute due to the size of your database and the complexity of the query—the server must calculate the total for every record in your database. As the number of records in your database increases, the time necessary to run the query also increases. When you replace the summary fields in the query with smart fields, you improve the time it takes to run the query considerably. The program automatically generates and caches the smart field values at intervals set by your system administrator. In addition, smart field updates consider only records added to the database since the last run date and do not reconsider records already included in the value.

You can use smart fields in a variety of ways throughout the program:

- To build queries and selections.
- To filter reports. With the Report Model Generator, you can use a smart field as the source view for a custom report.
- To quickly view details about a constituent's giving history on the Smart Fields tab of their

record.

- To calculate the entry amount for ask ladders on marketing effort reply devices.
- To calculate greatest need for sponsorship opportunities.
- To calculate for renewal notices when memberships are set to expire.

## Smart Field Workflow

The smart field workflow typically involves multiple people, including a smart field author, an administrator, and consumers who use the data generated by the smart field. Here are the primary roles involved in the smart field process and explanations of each:

- **Smart Field author:** The ability to author smart field definitions is available as a customization. If you need definitions beyond those included in the program, contact your in-house developer or implementation consultant.
- **Smart Field administrator:** The administrator creates smart fields based on management's requests. For example, at the beginning of each quarter, a user in your organization generates a query to track constituents who gave \$1,000 or more in the previous quarter. Management makes its request to the administrator and details what the smart field values should represent. The administrator creates and processes the smart fields to make them available to users for queries, reports, and related records. To satisfy this user, the smart field administrator creates two smart fields: one with constituent revenue amounts and another with constituent revenue dates.
- **Smart Field data consumer:** The consumer is the individual who views and uses the data generated by the smart field. Continuing with the smart field administrator example, the query user includes the "Value" field of the revenue amount smart field, assigning it a value Greater than or equal to \$1,000, and the "Value" field of the revenue dates smart field, assigning it a value Equal to last quarter.

## Add a Smart Field

When you add a smart field, you define parameters for the information the smart field returns. These parameters vary based on the type of smart field type.

For example, if you select the "Constituent appeal count" definition, the smart field requires parameters specific to appeals such as the business units and categories to include in its value. If you select "Constituent revenue amounts", the smart fields requires parameters specific to revenue such as calculation type and the revenue types to include in its value.

This section provides scenarios that demonstrate how to build a few commonly used smart fields. For more information about how to create other smart field definitions, see [Smart Field Definitions on page 154](#)

**Note:** If you need smart field definitions beyond those included in the program, contact your in-house developer or implementation consultant.

## > Add a constituent revenue amounts smart field

**Scenario:** A prospector in your organization begins each quarter by querying constituent records for donors who gave a total of \$1,000 or more the previous quarter. He has requested that the system administrator create smart fields to quickly calculate total giving for constituents. The gift smart field should also group constituents based on this his rating information: Fair = \$1,000; Good = \$3,000; and Excellent = \$5,000. Finally, he asked that all gift types be included but not soft credits. The administrator will create two smart fields: one to determine gift amounts and another for gift dates. This procedure shows you how to create the revenue amount smart field.

1. From *Administration*, click **Smart fields**. The Smart Fields page appears.
2. Click **Add**. The Select a smart field definition screen appears. Definitions specify how to calculate a smart field.  
For this scenario, select "Constituent revenue amounts."
3. Click **OK**. The Add constituent revenue amounts smart field screen appears.
4. On the **General** tab, enter a name for your smart field. For this scenario, because the prospector refers to revenue as gifts, enter "Gift Amounts."
5. In the **Description** field, enter a description for the field, such as how it should be used.
6. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.
7. Under **Value groups**, add designations based on values as necessary. In this scenario, the prospector wants three value groups: "Fair" for \$1,000 donors; "Good" for \$3,000 donors; and "Excellent" for \$5,000 donors. For information about how to add value groups, see [Add Value Groups to a Smart Field on page 148](#).

**Add constituent revenue amounts smart field**

General Parameters

**General**

Name:

Description:

**Value groups**

Value groups allow you to consolidate smart field values into groups based on a given value range. The highest valid range will be used when assigning a smart field value to a group.

Use value groups

Value groups:

Values greater than or equal...	Value group name
\$1,000.00	Fair
\$3,000.00	Good
\$5,000.00	Excellent

Help Save Cancel

8. Select the Parameters tab.
9. In the **Value to return** field, select the calculation type for the smart field. For this scenario, select "Total gift amount" because the prospector wants each constituent's total gift for the previous quarter.
10. If necessary, select whether to base the smart field on specific dates or recent dates, and enter the time period for the smart field.

For this scenario, the revenue date smart field and the values selected by the prospector in *Query* determine the time period for the smart field, so leave the fields blank.

11. Under **Revenue types and designations**, select the revenue types to include in the smart field value. For this scenario, the prospector requested all types of revenue, so select all the checkboxes.

**Note:** If you do not select any revenue types, the smart field will include all types.

12. You can filter revenue included in the smart field value based on the designation associated with the revenue. Under **Designations**, search for and select the designations to use in your smart field value. If you do not select a designation, the value includes revenue from all designations. No designations were requested for this smart field.
13. You can filter revenue included in the smart field value based on the campaign associated with the revenue. Under **Campaigns**, search for and select the campaigns to use in your smart field value. If you do not select a campaign, the value includes revenue from all campaigns. No campaigns were requested for this smart field.

**Add constituent revenue amounts smart field**

General Parameters

**General**

Value to return: Total gift amount

Specific dates

Start date: mm/dd/yyyy

End date: mm/dd/yyyy

Recent dates

Time period: Years

Years: 0

**Revenue types and designations**

Revenue types:

- Donation
- Matching gift claim
- Matching gift payment
- Pledge
- Pledge payment
- Recurring gift payment

Designations

*	
---	--

Campaigns

*	
---	--

Help Save Cancel

14. Click **Save**. The smart field is added to the system, and you return to the Smart Fields page. You now must process the smart field. This makes the smart field value available for queries, reports, and in related records. For more information about how to process a smart field, see [Process a Smart Field on page 151](#).

➤ **Add a constituent revenue date smart field**

This procedure is a continuation of the scenario outlined in the [Add a constituent revenue amounts smart field on page 139](#).

1. On the Smart Fields page, click **Add**. The Select a smart field definition screen appears. Definitions specify how to calculate a smart field.  
For this scenario, select "Constituent revenue dates."
2. Click **OK**. The Add constituent revenue dates smart field screen appears.
3. On the General tab, enter a name for your smart field. For this scenario, because the prospector refers to revenue as gifts, enter "Gift Dates."
4. In the **Description** field, enter a description for the field, such as how it should be used.
5. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.
6. Under **Value groups**, add designations based on values as necessary. In this scenario, value groups are not needed for the gift date smart field.

**Add constituent revenue dates smart field**

General Parameters

**General**

Name:

Description:

Category:

**Value groups**

Value groups allow you to consolidate smart field values into groups based on a given value range. The highest valid range will be used when assigning a smart field value to a group.

Use value groups

Time period:

Value groups:

Values greater than or equa...	Value group name

Help Save Cancel

7. Select the Parameters tab.
8. In the **Value to return** field, select the calculation type for this smart field. For this scenario, select "Latest date."
9. If necessary, in the **Start date** and **End date** fields, select the time period for the smart field. For this scenario, the values selected by the prospector in *Query* determine the time period, so leave the fields blank.

10. Under **Revenue types and designations**, select the revenue types to include in the smart field value. For this scenario, the prospector requested all types of revenue, so select all the checkboxes.

**Note:** If you do not select any revenue types, the smart field will include all types.

11. You can filter dates included in the smart field value based on the designation. Under **Designations**, search for and select the designations to use in your smart field value. If you do not select a designation, the value includes revenue from all designations. No designations were requested for this smart field scenario.
12. You can filter dates included in the smart field value based on the campaign. Under **Campaigns**, search for and select the campaigns to use in your smart field value. If you do not select a campaign, the value includes revenue from all campaigns. No campaigns were requested for this smart field scenario.

13. Click **Save**. The smart field is added to the system, and you return to the Smart Fields page. You now must process the smart field. This makes the smart field value available for queries,



reports, and in related records. For more information about how to process a smart field, see [Process a Smart Field on page 151](#).

### > Add a constituent revenue application amounts smart field

**Scenario:** Your organization's Direct Response Manager needs a smart field that calculates an individual constituent's total giving amount for the last 24 months. This value will provide the monetary component of her "RFM" (recency, frequency, monetary) direct response segmentation schema. Using the "Constituent revenue application amounts" smart field definition, we will build a smart field that includes all basic gift payments (payments applied to Donations, Pledges, and Recurring Gifts) within the last 24 months and excludes soft credits and all other types of applications. We will create three value groups to group constituents based on these ranges of total giving: under \$1k, \$1k - \$5k, and over \$5k.

1. From *Administration*, click **Smart fields**. The Smart Fields page appears.
2. Click **Add**. The Select a smart field definition screen appears. Definitions specify how to calculate a smart field.  
For this scenario, select "Constituent revenue application amounts."
3. Click **OK**. The Add constituent revenue application amounts smart field screen appears.
4. On the General tab, enter a name for your smart field. For this scenario, enter "Total giving 0-24 months."
5. In the **Description** field, enter a description for the field, such as its intended use.
6. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.
7. Under **Value groups**, add values as necessary. In this scenario, we add three value groups: "Under \$1k," "\$1k - \$5k," and "Over \$5k." For information about how to add value groups, see [Add Value Groups to a Smart Field on page 148](#).

**Add constituent revenue application amounts smart field**

General Parameters Site filtering

**General**

Name: Total giving 0-24 months

Description:

Category:

**Value groups**

Value groups allow you to consolidate smart field values into groups based on a given value range. The highest valid range will be used when assigning a smart field value to a group.

Use value groups

Value groups:

Values greater than or equal to	Value group name
\$0.00	Under \$1K
\$1,000.00	\$1K-\$5K
\$5,000.00	\$5K+

Help Save Cancel

8. Select the Parameters tab.
9. In the **Value to return** field, select the calculation type for the smart field. For this scenario, select "Total application amount" because we want to sum all payments applied to donations, pledges, and recurring gifts.
10. In the **For** field, select "Constituent revenue" because we want to calculate the total giving for the individual constituent and exclude soft credits they may receive as part of a household. Alternately, you can select "Constituent revenue recognition" if your organization uses recognition programs.
11. Under **Revenue types**, select the revenue types to include in the smart field value. For this scenario we want to include only basic gifts so we select the **Donation** checkbox.
12. Under **Transaction type/Application**, select the application types to include in the smart field value. For this scenario we want to include only gift payments and no other commitments in the total. Under **Payment**, select the **Donation**, **Pledge**, and **Recurring gift** checkboxes.
13. You can filter revenue included in the smart field value based on a selection. In the **Application selection** field, search for and select the selection to use in your smart field value. For example, you can choose a selection that contains gifts to specific designations. For this scenario, leave the field blank.
14. We need to narrow the range of gifts to those within the last 24 months. Under **Timeframe**, in the **Date range** field, select "Relative dates." In the **Time period** field, select "Months." In the **Months** field, enter "24." Because you selected "Relative dates," the date range used is the 24 month period before the date the smart field was last refreshed.

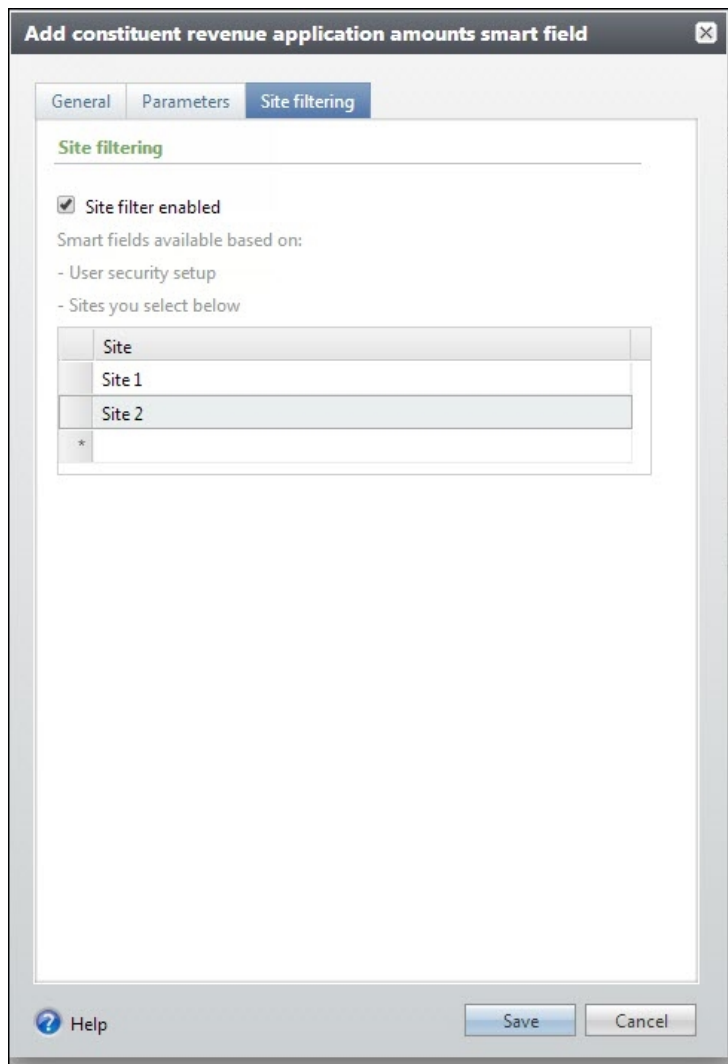
15. To restrict the records processed in the calculation by site, under **Sites**, select the sites to include. The sites available in the grid are only those you have rights to. If you do not select sites, the smart field is calculated for all sites in the organization.

**Note:** If the sites selected in the grid are not the same as those assigned to the application selection, this may result in no records being calculated by the smart field. For example, a selection includes gifts from Site A. When you add this selection to a revenue application smart field assigned to Site B, no records are returned because the sites conflict.

**Note:** Site settings on the Parameters tab and Site filtering tab work independently of each other and do not have to match. Site filtering simply restricts the smart fields a user can view on the Smart Fields tab of records. Sites selected on the Parameters tab restrict the records included in the smart field calculation.

16. Select the Site filtering tab.
17. To enable site filtering, select **Site filter enabled**.
18. In the **Site** grid, you can select sites to associate with this smart field. The sites available in the grid are only those you have rights to.

When you associate a smart field with a site, only users with rights to the selected site can view the smart field on constituent records, sponsorship child records, and sponsorship project records. Sites selected on the Site filtering tab do not restrict the smart field from inclusion in a process.



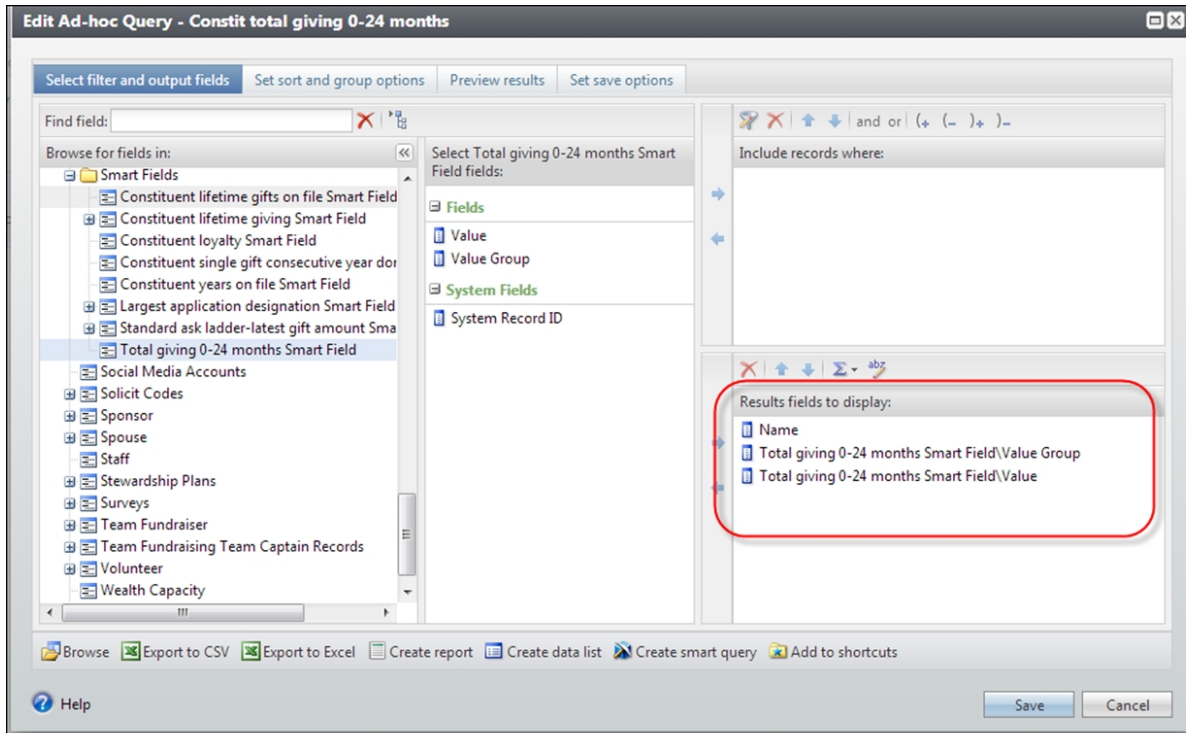
19. Click **Save**. The smart field is added to the system and you return to the Smart Fields page. To generate values for the smart field you now must process the smart field. This makes the smart field value available for queries, reports, and in related records. For more information about how to process a smart field, see [Process a Smart Field on page 151](#).

## Add Value Groups to a Smart Field

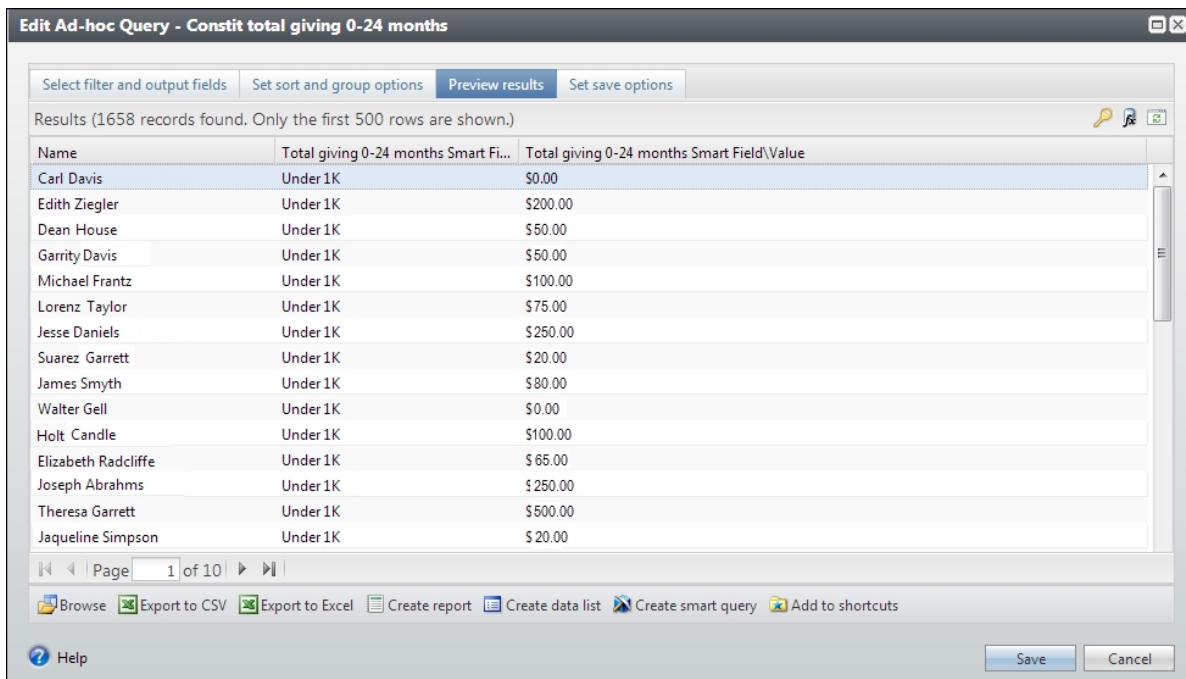
A smart field uses value groups to consolidate records into groups based on ranges of values. For example, using the scenario provided for the [Constituent revenue application amount smart field](#), we can create groups of constituents based on their total giving amounts: Under \$1k, \$1k - \$5k, and Over \$5k.

When you use a smart field to create a query, you can choose to filter and output based on value groups. For example, you can build a marketing segment for each value group produced by the total giving smart field (Under \$1k, \$1k - \$5k, and Over \$5k). Using value groups can save you from having to define the criteria for value ranges on the query itself.

Value groups appear as output fields in queries:



Query results are grouped as defined by the value groups.



### ➤ Add value groups to a smart field

1. On the Add smart field or Edit smart field screen, select the General tab.
2. Select **Use value groups**.
3. Click **Add**. The Add value group screen appears.

4. In the **Values greater than or equal to** column, enter the minimum value of the range included in the group. For example, enter
5. In the **Value group name** column, enter a unique name to help describe values included in the group.

**Note:** For smart fields that generate a date value, such as Constituent largest revenue date, in the **Time period** field, you can select the measure of time from the current date (days, weeks, years, etc.) to use for the calculation.

6. Click **Save**. You return to the previous screen.

## Manage Smart Fields

You can create and manage your organization's smart fields on the Smart Fields page. To access this page, from *Administration*, under **Data**, click **Smart fields**.

Name	Description	Type	Last run on	Last run duration	Last run by	Last run record c...	Last run status
Largest application designation		Constituent revenue application		00:00:02	Nikki Tremann	1856	Completed
Total giving 0-24 months		Constituent revenue application am...	1/8/2014	00:00:01	Nikki Tremann	1856	Completed
Standard ask ladder-latest gift amount		Constituent revenue amounts					Not started
Constituent lifetime gifts on file		Constituent Lifetime gifts on file					Not started
Constituent lifetime giving		Constituent Lifetime giving					Not started
Constituent loyalty		Constituent Loyalty					Not started
Constituent single gift consecutive year d...		Constituent Single gift consecutive ...					Not started
Constituent years on file		Constituent Years on file					Not started

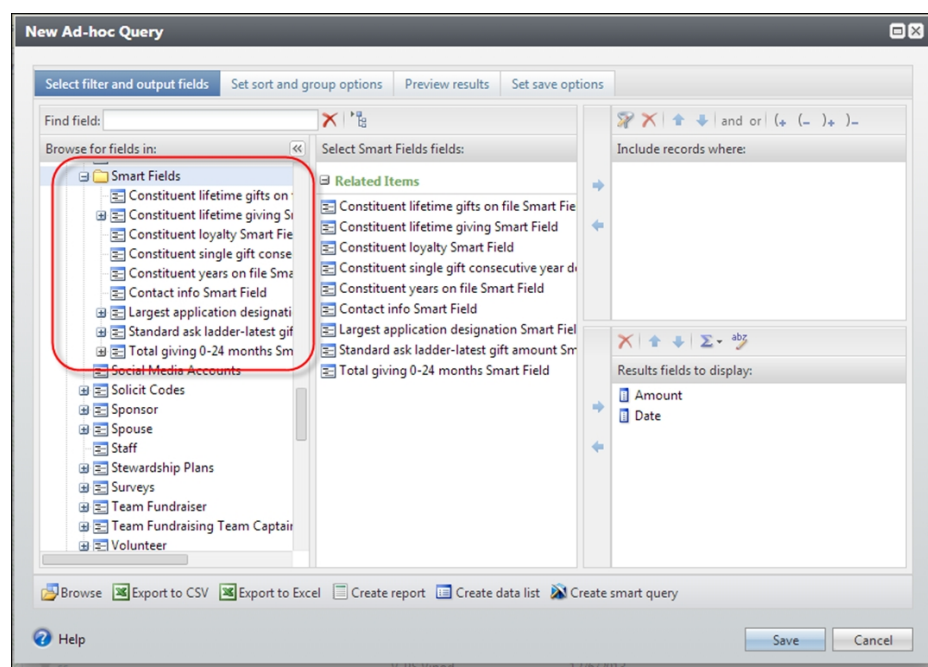
In the Smart Fields list, you can view information about the smart fields your organization uses, such as when the field was last processed and who ran it. You can choose which columns of information appear in the list.

You can also complete tasks for a smart field from the Smart Fields page. To access task buttons, click the double arrows next to a smart field to expand the row.

- To generate values for a smart field, click **Process smart field**. For more information, see [Process a Smart Field on page 151](#).
- To reset the last run date so the calculation includes information entered during all dates that satisfy the date range entered for the smart field and not just information entered since the previous update, click **Clear results**. For more information, see [Clear the Results from the Last Run of a Smart Field on page 153](#).
- To open the process record for a smart field and view information about recent updates, process history, and job schedules, click the smart field's name. For information about the items on the record, see [Smart Field Process Record on page 152](#).

## Process a Smart Field

After you add or edit a smart field, you must process it to calculate values. Processed smart fields are automatically available for use in queries, reports, and records in the program. For example, processed constituent smart fields appear under Constituent nodes in queries and on the Smart Fields tab of constituent records.



**Tip:** You can schedule the process to automatically update the values of a smart field to run at set intervals. For information about how to schedule a smart field process, see [Add a Job Schedule on page 153](#).

### ➤ Process values for a smart field

1. On the Administration page, click **Smart fields**. The Smart Fields page appears.

- Click the double arrows next to the smart field to expand the row. Then click **Process smart field**. The program generates the values for the smart field. When the process is complete, the process record appears.

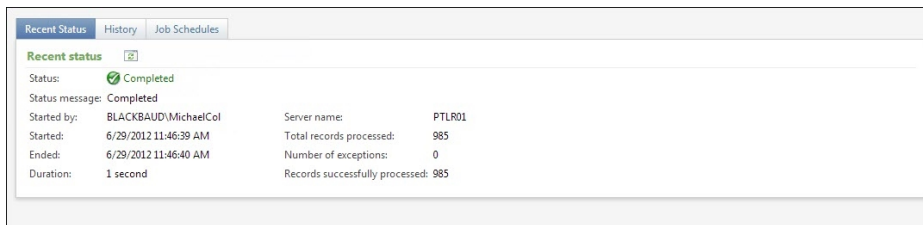
**Note:** You can also process a smart field from its process record. Under **Tasks**, click **Start process**.

## Smart Field Process Record

When you process a smart field, the program automatically generates a process record. From the process record, you can use the tabs to view information about recent updates, process history, and job schedules. To access the process record, click the smart field's name.

### Recent Status

To view information about the most recent update of the smart field, select the Recent status tab. On this tab, you can view the current status of the process to determine whether it completed successfully. You can also view the status message generated for the most recent run; the user who ran the process and on which server; the dates and times the process started and ended and its duration; and the total number of records processed, how many of those records processed successfully, and how many exceptions it generated.



### History

To view information about the previous updates of the smart field, select the History tab. On this tab, you can view records of the previous instances the process was run. For each instance, you can view its status, the status message generated for it, the user who ran it, its start and end dates, its duration, the total number of records processed, and which server handled the process.

The screenshot shows the 'History' tab with a table of process instances:

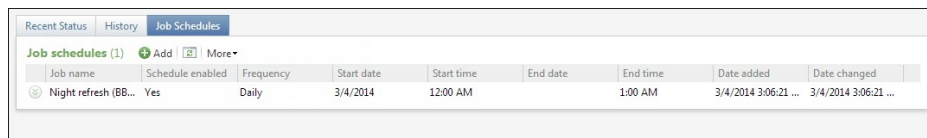
Status	Status message	Started by	Started	Ended	Duration	Number of records ...	Server name
<span style="color: green;">✔</span> Completed	Completed	BLACKBAUD\Mich...	6/29/2012	6/29/2012	00hr 00min 01s	985	PTLR01
<span style="color: green;">✔</span> Completed	Completed	BLACKBAUD\Mich...	6/29/2012	6/29/2012	00hr 00min 00s	985	PTLR01
<span style="color: green;">✔</span> Completed	Completed	BLACKBAUD\Mich...	6/29/2012	6/29/2012	00hr 00min 00s	985	PTLR01
<span style="color: green;">✔</span> Completed	Completed	BLACKBAUD\Mich...	6/29/2012	6/29/2012	00hr 00min 00s	984	PTLR01

To filter the process instances that appear in the list, click **Filters**. To download an output file that contains all records from the last process run, click **More** and select the file type.



## Job Schedules

To view the job schedules set for the update process, select the Job schedules tab. For each job schedule, you can view its job name, whether it is enabled, its frequency, its start date and time, its end date and time, and the dates the schedule was added and changed in the database.



Job name	Schedule enabled	Frequency	Start date	Start time	End date	End time	Date added	Date changed
Night refresh (BB...	Yes	Daily	3/4/2014	12:00 AM		1:00 AM	3/4/2014 3:06:21 ...	3/4/2014 3:06:21 ...

From the **Job schedules** grid, you can manage the job schedules set for the business process.

## Add a Job Schedule

You can create a job schedule to automatically run the smart field update business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. During periods of increased gift entry, you may want to schedule the process to run even more frequently. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

**Note:** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

To automate a process, you can create a job schedule for the process. When you create a job schedule, you define when the job begins to run. After you add the schedule, you can use *SQL Server Agent* jobs to automatically process smart field values and run the task on a recurring basis. To schedule the job, you must define the conditions that cause the job to begin.

## Clear the Results from the Last Run of a Smart Field

When you process a smart field, the program updates its values based on the information added to the database since the last time it was processed. To include information from all dates in the specified date range rather than just information entered since the previous update, you can reset the last run date for the smart field. On the Smart Fields page, the last run date appears in the **Last run on** column.

From the Smart Fields page, click the double arrows next to the smart field to expand the row. Then click **Clear results**. The date in the **Last run on** column is removed to reflect the change.

### > Reset the last run date for a smart field

1. On the Administration page, click **Smart fields**. The Smart Fields page appears.
2. Select the smart field and click **Clear results**. A confirmation message appears.
3. Click **Yes**. You return to the Smart Fields page.

## Update Smart Field Query Relationships

If you add a new queryview, such as through a customization process, after you create a smart field, the new queryview does not automatically add the smart field. To add the smart field to the new queryview, you must update the relationships between your smart fields and queries.

From the Smart Fields page in *Administration*, click **Update smart field query relationships** under **Tasks**.

## Smart Field Definitions

This section describes the values returned by smart field definitions.

**Note:** Smart fields do not exclude inactive records.

## Constituent Smart Fields

These are descriptions of each smart field definition you can create for constituent data.

Smart Field Type	Description
<b>Constituent age</b>	Provides the constituent's current age.
<b>Constituent exists in selection</b>	Provides whether the constituent is included in the specified selection. Returns Yes/No values.
<b>Constituent appeal count</b>	Provides the number of appeals made to the constituent during the specified time period. You can filter the appeals included by business units, categories, and report codes.
<b>Constituent appeal years</b>	Provides the number of years between the first and last appeal made to the constituent during the specified time period. You can filter the appeals included by business units, categories, and report codes.
<b>Last constituent appeal name</b>	Provides the name of the most recent appeal made to the constituent during the specified time period. You can filter the appeals included by business units, categories, and report codes.

Smart Field Type	Description
<b>Constituent contact information</b>	<p>Provides whether the constituent has contact information (address, phone, and/or email) entered on their record.</p> <p>Returns Yes/No values.</p>
<b>Constituent recognition credit amounts</b>	<p>Provides a constituent's smallest, total, average, or largest recognition credit amount for the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent recognition credit dates</b>	<p>Provides the constituent's earliest or latest recognition credit date during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent annual revenue renewer</b>	<p>Provides whether the constituent is an annual revenue renewer during the specified time period. An annual renewer is a constituent who has given a gift every year since their first gift.</p> <p>Returns Yes/No values.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent largest revenue date</b>	<p>Provides the date of the constituent's largest gift during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent recurring gift last installment dates</b>	<p>Provides the date of the constituent's most recent recurring gift payment during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>

**Smart Field Type**

**Description**

**Constituent recurring gift missed installment counts**

Provides the number of recurring gift payments missed by the constituent during the specified time period.

You can filter the revenue included by revenue type, designations, and campaigns.

NOTE: If you do not select revenue types, all types are used.

**Constituent revenue amounts**

Provides the constituent's largest, smallest, total or average gift amount during the specified time period.

You can filter the revenue included by revenue type, designations, and campaigns.

NOTE: If you do not select revenue types, all types are used.

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Smart Field Type	Description
<b>Constituent revenue application</b>	<p>Provides details about the largest, smallest, first, or latest constituent or household/group revenue application for the selected revenue transition types.</p> <p>Use this smart field when you need information about revenue applications associated with a constituent or household rather than the calculated amounts. For example, you can set the parameters to return all first gift records. "First gifts Smart Field" then appears as a query node under Smart Fields in all constituent queries. Use this query node to drill-down and select field information associated with the first gift record, such as the appeal name or package ID.</p> <p>NOTE: If you do not select revenue types, transaction/application types, recognition credit types, or an application selection, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p> <p>NOTE: If you select an application selection, it must be associated with the same sites as those selected in the <b>Sites</b> grid. For more information, see <a href="#">Filtering Smart Fields By Site on page 171</a>.</p>

**Smart Field Type****Description**

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**Constituent revenue application amounts**

Provides the largest, smallest, total, average, first, or latest constituent or household/group gift amounts or recognition credits during the specified time period.

Use this value when you need to consider how revenue was applied to multiple designations or commitments, or within a household or group. Unlike the Constituent revenue amounts smart field, this field allows you to choose which types of applications you want to include in the amount. For example, if you want the total gift amount to include only donations and pledge payments, you can set the parameters to exclude applications to other type of commitments, such as event registrations or other fees. When a constituent makes a payment that is split between a pledge and an event registration, their total gift amount includes only the portion of the payment applied to the pledge.

NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.

NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.

NOTE: If you select an application selection, it must be associated with the same sites as those selected in the **Sites** grid. For more information, see [Filtering Smart Fields By Site on page 171](#).

---

Smart Field Type	Description
<b>Constituent revenue application annual renewer</b>	<p>Provides whether the constituent or household/group is an annual revenue renewer. An annual renewer is a constituent or household/group that has given a gift every year since their first gift.</p> <p>Returns Yes/No values.</p> <p>NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p> <p>NOTE: If you select an application selection, it must be associated with the same sites as those selected in the <b>Sites</b> grid. For more information, see <a href="#">Filtering Smart Fields By Site on page 171</a>.</p>
<b>Constituent revenue application counts</b>	<p>Provides the number of giving years, distinct giving years, total number of applications, or consecutive giving years for revenue applications for the constituent or household/group.</p> <p>Giving years = Year of most recent gift — year of earliest gift +1</p> <p>Distinct giving years = Total number of years gifts were given (not necessarily consecutive)</p> <p>Consecutive giving years = Number of consecutive years gifts were given</p> <p>For example, Joe gave in the years 2002, 2003, 2007, 2008, and 2009.</p> <p>Giving years = 8 (2009-2002+1)</p> <p>Distinct giving years = 5</p> <p>Consecutive giving years = 3 (2007-present)</p> <p>select if the data returned should represent revenue or revenue recognition credits for constituents or household members.</p> <p>NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p> <p>NOTE: If you select an application selection, it must be associated with the same sites as those selected in the <b>Sites</b> grid. For more information, see <a href="#">Filtering Smart Fields By Site on page 171</a>.</p>

Smart Field Type	Description
<b>Constituent revenue application dates</b>	<p>Provides the latest, earliest, or largest gift dates for the constituent or household/group.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p> <p>NOTE: If you select an application selection, it must be associated with the same sites as those selected in the <b>Sites</b> grid. For more information, see <a href="#">Filtering Smart Fields By Site on page 171</a>.</p>
<b>Constituent revenue counts</b>	<p>Provides the constituent's number of gifts during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent revenue dates</b>	<p>Provides the constituent's earliest or latest gift dates during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>
<b>Constituent revenue giving years</b>	<p>Provides the number of years between the constituent's first and last gifts or the number of years the constituent gave gifts.</p> <p>Years between first and latest gifts - Returns the number of years the constituent gave a gift, not including the first and last gifts.</p> <p>Distinct giving years - Returns the total number of years the constituent gave a gift.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p>



Smart Field Type	Description
<b>Household revenue amounts</b>	<p>Provides the largest, smallest, total, or average household/group gift amounts during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns.</p> <p>NOTE: If you do not select revenue types, all types are used.</p> <p>NOTE: If the Revenue type is set to Event registration and you select a designation in the Designations field, the field will not process any event registration records.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p>
<b>Household revenue dates</b>	<p>Provides the latest or earliest household/group gift dates during the specified time period.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns. You can also filter by the amount type: Received, Not yet received, and Deferred.</p> <p>NOTE: If you do not select revenue or amount types, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p>
<b>Household revenue giving years</b>	<p>Provides the number of years between the household/group's first and last gifts or the number of years the household gave gifts during the specified time period.</p> <p>Years between first and latest gifts - Returns the number of years the household gave a gift, not including the first and last gifts.</p> <p>Distinct giving years - Returns the total number of years the household gave a gift.</p> <p>You can filter the revenue included by revenue type, designations, and campaigns. You can also filter by the amount type: Received, Not yet received, and Deferred.</p> <p>NOTE: If you do not select revenue or amount types, all types are used.</p> <p>NOTE: Household/group gifts include gifts from the constituent, the constituent's household or group, and any member of the constituent's household or group.</p>

## Marketing Smart Fields

These are descriptions of each smart field definition you can create for marketing data. These fields are provided by default in the program. You can use them to create a Source Analysis Rule for a record source. For more information, see [Select Source Analysis Rule Fields for a Record Source on page 186](#).

Smart Field Type	Description
<b>Constituent Ask Ladder</b>	<p>Provides the smallest, last, largest, or average gift value. Use this value to calculate entry amounts for ask ladders based on the constituent's previous giving.</p> <p><b>Default value</b> - For the <b>Default value</b> field, enter the entry amount to return when a value can not be calculated.</p>
<b>Constituent Lifetime gifts on file</b>	Provides the number of gifts on file for each member of a group of constituents.
<b>Constituent Lifetime giving</b>	Provides the sum total of all gifts for each constituent.
<b>Constituent Loyalty</b>	<p>Determines a loyalty category based on gifts given on an annual basis.</p> <p>Assigns these categories to constituents based on the calculation for loyalty:</p> <ul style="list-style-type: none"> <li>- New</li> <li>- Multi</li> <li>- Lapsed</li> <li>- Reactivated</li> <li>- Non Donor</li> </ul> <p>For more information, see <a href="#">Calculation for Loyalty on page 163</a>.</p>
<b>Constituent Single gift consecutive year donors</b>	<p>Determines a category for donors who gave a single gift in the last 5 consecutive years.</p> <p>This is a variant on loyalty.</p> <p>Applies a calculation to categorize single gifts. For more information, see <a href="#">Calculation for Single Gift Consecutive Year Donors on page 164</a>.</p>
<b>Constituent Years on file</b>	Provides the years since first donation for each member of a group of constituents.

## Calculation for Loyalty

Category	Criteria
New	Gift within 1 year of As Of Date
Multi (10 + years)	Gift each year within the past 10+ years, based on As Of Date
Multi (9 years)	Gift each year within the past 9 years, based on As Of Date
Multi (8 years)	Gift each year within the past 8 years, based on As Of Date
Multi (7 years)	Gift each year within the past 7 years, based on As Of Date
Multi (6 years)	Gift each year within the past 6 years, based on As Of Date
Multi (5 years)	Gift each year within the past 5 years, based on As Of Date
Multi (4 years)	Gift each year within the past 4 years, based on As Of Date
Multi (3 years)	Gift each year within the past 3 years, based on As Of Date
Multi (2 years)	Gift each year within the past 2 years, based on As Of Date
Reactivated	Gift in the current year, No gift in the previous year, and a gift in some prior year, based on As Of Date
Lapsed (1yr-New)	No gift in the current year, a gift in the previous year, and no gifts in some prior year, based on As Of Date
Lapsed (1yr)	No gift in the current year, a gift in the previous year, and gifts in some prior year, based on As Of Date
Lapsed (2yr)	No gifts in the past 2 years, based on As Of Date
Lapsed (3yr)	No gifts in the past 3 years, based on As Of Date
Lapsed (4yr)	No gifts in the past 4 years, based on As Of Date
Lapsed (5yr)	No gifts in the past 5 years, based on As Of Date
Lapsed (6yr)	No gifts in the past 6 years, based on As Of Date
Lapsed (7yr)	No gifts in the past 7 years, based on As Of Date
Lapsed (8yr)	No gifts in the past 8 years, based on As Of Date
Lapsed (9+yr)	No gifts in the past 9 years, based on As Of Date
Non-donor	No gift in the past 10+ years, based on As Of Date

## Calculation for Single Gift Consecutive Year Donors

### Category Criteria

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No Gifts	No gift in the past 10+ years, based on As Of Date
2 years	A single gift each year in the past 2 years and any or no gifts in the following years, based on As Of Date
3 years	A single gift each year in the past 3 years and any or no gifts in the following years, based on As Of Date
4 years	A single gift each year in the past 4 years and any or no gifts in the following years, based on As Of Date
5 years	A single gift each year in the past 5 years and any or no gifts in the following years, based on As Of Date
Other	Any other combination of gifts over past 10+ years, based on the As Of Date

## Membership Smart Fields

These are the smart field definitions you can create for membership data.

Smart Field Type	Description
Membership expiration	Provides the number of days, weeks, months, quarters, or years until a membership is set to expire.

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## Sponsorship Smart Fields

These are the smart field definitions you can create for sponsorship data.

Smart Field Type	Description
<b>Sponsor active sponsorship count</b>	Provides the number of active sponsorships associated with the sponsor.

---

Smart Field Type	Description
<b>Sponsorship child active sponsor count</b>	Provides the number of active sponsors associated with a child. For example, if you allow opportunities to have more than one sponsor, you can use this count to create a greatest need rule that ensures all children must have at least one sponsor before any other child can have multiple sponsors. In <i>Sponsorships</i> , on the Add a greatest need rule set screen, select the Sponsorship child active sponsor count smart field. For the <b>Greatest need field values</b> , select <b>Lower</b> to order the results in ascending order. This ensures opportunities with the smallest numbers of sponsors appear first in the list of results.

**Smart Field Type****Description**

---

**Sponsorship child available count**

Provides for each child the number of other children available with the same opportunity dimensions. For example, you can use "Gender" as the **Opportunity dimension** to calculate the number of male and female children available for sponsorship. If your organization has 80 boys and 75 girls total, but only 60 of the boys are available for sponsorship and 40 of the girls are, this smart field would return 60 as the count for every boy and 40 for every girl.

NOTE: You can specify more than one dimension for the Sponsorship child available count smart field (i.e., gender and location, location and age range, etc.). The calculation provides results for each combination of the chosen dimensions (i.e., boys 0-4, girls 0-4, boys 5-8, girls 5-8, etc.).

There are two ways to use the Sponsorship child available count smart field to calculate greatest need. The first is to order the greatest need rule by the smart field value, for example, to ensure that an equal number of boys and girls are sponsored. In *Sponsorship*, create a greatest need rule set and select the Sponsorship child available count field. For the **Greatest need field values**, select **Higher** to order the results in descending order. This ensures that boys are returned as the greatest need until the number of available boys decreases to the same level as the number of available girls. If the number of boys becomes fewer than girls, girls are returned first as greatest need.

A second way to use Sponsorship child available count to calculate greatest need is to provide "buffers" on another field based on priority. For example, you can use this smart field to ensure that you always have children available when a sponsor requests a child in a particular region. To do this, you can set up a smart field instance which uses "Region" as its **Opportunity dimension**. NOTE: If you use multiple opportunity dimensions, select them in the order you want them considered when determining greatest need. In *Sponsorship*, create a greatest need rule set based on "Region," and include three regions: Africa, Asia, and Latin America. In **Use threshold of field**, select the Sponsorship child available count smart field you created for "Regions" and specify **Is greater than "10."** When assigning children based on this greatest need rule, the threshold specifies that when the availability in Africa falls to 10 children, the program will start to assign sponsors to children in Asia. When the pool in Asia reaches 10, the program will assign sponsors to children in Latin America.

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Smart Field Type	Description
<b>Sponsorship child available percent</b>	<p>Provides for each child the percentage of other children available with the same opportunity dimensions. The percentage equals the available count divided by total count. For example, you can use "Gender" as the <b>Opportunity dimension</b> to calculate the percentage of male and female children available for sponsorship. If your organization has 80 boys and 75 girls total, but only 60 of the boys are available for sponsorship and 40 of the girls are, the Sponsorship child available percent would return 75 for every boy (<math>60/80 \times 100</math>) and 53 for every girl (<math>40/75 \times 100</math>).</p> <p>NOTE: You can specify more than one dimension for the smart field (i.e., gender and location, location and age range, etc.). The calculation provides results for each combination of the chosen dimensions (i.e., boys 0-4, girls 0-4, boys 5-8, girls 5-8, etc.).</p> <p>There are two ways to use the Sponsorship child available percent smart field to calculate greatest need. The first is to order the greatest need rule by the smart field value, for example, to ensure that an equal percentage of boys and girls are sponsored. In <i>Sponsorship</i>, create a greatest need rule set and select the Sponsorship child available percent field. For the <b>Greatest need field values</b>, select <b>Higher</b> to order the results in descending order. This ensures that boys are returned as the greatest need until the percentage of available boys decreases to the same level as the percentage of available girls. If the percentage of boys becomes less than girls, girls are returned first as greatest need.</p> <p>A second way to use Sponsorship child available percent to calculate greatest need is to provide "buffers" on another field based on priority. For example, you can use this smart field to ensure that you always have children available when a sponsor requests a child in a particular region. To do this, you can set up a smart field instance which uses "Region" as its <b>Opportunity dimension</b>. NOTE: If you use multiple opportunity dimensions, select them in the order you want them considered when determining greatest need.</p> <p>In <i>Sponsorship</i>, create a greatest need rule set based on "Region," and include three regions: Africa, Asia, and Latin America. In <b>Use threshold of field</b>, select the Sponsorship child available percent smart field you created for "Regions" and specify <b>Is greater than "25."</b> When assigning children based on this greatest need rule, the threshold specifies that when the availability of children in Africa falls below 25%, the program will start to assign sponsors to children in Asia. When the pool in Asia reaches 25%, the program will assign sponsors to children in Latin America.</p>

**Smart Field Type****Description**

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**Sponsorship project active sponsor count**

Provides the number of active sponsors associated with a project. For example, if you allow projects to have more than one sponsor, you can use this count to create a greatest need rule that ensures all projects must have at least one sponsor before any other project can have multiple sponsors. In *Sponsorships*, on the Add a greatest need rule set screen, select the Sponsorship project active sponsor count smart field. For the **Greatest need field values**, select **Lower** to order the results in ascending order. This ensures projects with the fewest numbers of sponsors appear first in the list of results.

---



Smart Field Type	Description
<b>Sponsorship project available count</b>	<p>Provides for each project the number of other projects available with the same opportunity dimensions. For example, you can use “Category” as the <b>Opportunity dimension</b> to calculate the number of water and school projects available for sponsorship. If your organization has 80 water projects and 75 school projects total, but only 60 of the water projects are available for sponsorship and 40 of the school projects are, the smart field returns 60 as the count for every water project and 40 for every school project.</p> <p>NOTE: You can specify more than one dimension for the smart field (i.e., category and location, location and status, etc.). The calculation would provide results for each combination of the chosen dimensions (i.e., water Africa, school Africa, water Asia, school Asia, etc.).</p> <p>There are two ways to use the Sponsorship project available count smart field to calculate greatest need. The first is to order the greatest need rule by the smart field value, for example, to ensure that an equal number of water projects and school projects are sponsored. In <i>Sponsorship</i>, create a greatest need rule set and select the Sponsorship project available count field. For the <b>Greatest need field values</b>, select <b>Higher</b> to order the results in descending order. This ensures that water projects are returned as the greatest need until the number of available water projects decreases to the same level as the number of available school projects. If the number of water projects becomes fewer than school projects, school projects are returned first as greatest need.</p> <p>A second way to use Sponsorship project available count to calculate greatest need is to provide “buffers” on another field based on priority. For example, you can use this smart field to ensure that you always have projects available when a sponsor requests a project in a particular region. To do this, you can set up a smart field instance which uses “Region” as its <b>Opportunity dimension</b>. NOTE: If you use multiple opportunity dimensions, select them in the order you want them considered when determining greatest need.</p> <p>In <i>Sponsorship</i>, create a greatest need rule set based on “Region,” and include three regions: Africa, Asia, and Latin America. In <b>Use threshold of field</b>, select the Sponsorship project available count smart field you created for “Regions” and specify <b>Is greater than “10.”</b> When assigning projects based on this greatest need rule, the threshold specifies that when the availability in Africa falls to 10 projects, the program will start to assign sponsors to projects in Asia. When the pool in Asia reaches 10, the program will assign sponsors to projects in Latin America.</p>

**Smart Field Type****Description**

---

**Sponsorship project available percent**

Provides for each project the percentage of other projects available with the same opportunity dimensions. The percentage equals the available count divided by total count. For example, you can use "Category" as the **Opportunity dimension** to calculate the percentage of water and school projects available for sponsorship. If your organization has 80 water projects and 75 school projects total, but only 60 of the water projects are available for sponsorship and 40 of the school projects are, this smart field returns 75 for every water project ( $60/80*100$ ) and 53 for every school project ( $40/75*100$ ).

NOTE: You can specify more than one dimension for the smart field (i.e., category and location, location and status, etc.). The calculation would provide results for each combination of the chosen dimensions (i.e., water Africa, school Africa, water Asia, school Asia, etc.).

There are two ways to use the Sponsorship project available percent smart field to calculate greatest need. The first is to order the greatest need rule by the smart field value, for example, to ensure that an equal percentage of water and school projects are sponsored. In *Sponsorship*, create a greatest need rule set and select the Sponsorship available percent field. For the **Greatest need field values**, select **Higher** to order the results in descending order. This ensures that water projects are returned as the greatest need until the percentage of available water projects decreases to the same level as the percentage of available school projects. If the percentage of water projects become less than school projects, school projects are returned first as greatest need.

A second way to use Sponsorship project available percent to calculate greatest need is to provide "buffers" on another field based on priority. For example, you can use this smart field to ensure you always have projects available when a sponsor requests a project in a particular region. To do this, you can set up a smart field instance which uses "Region" as its **Opportunity dimension**. NOTE: If you use multiple opportunity dimensions, select them in the order you want them considered when determining greatest need.

In *Sponsorship*, create a greatest need rule set based on "Region," and include three regions: Africa, Asia, and Latin America. In **Use threshold of field**, select the Sponsorship project available percent smart field you created for "Regions" and specify **Is greater than** "25." When assigning projects based on this greatest need rule, the threshold specifies that when the availability of projects in Africa falls below 25%, the program will start to assign sponsors to projects in Asia. When the pool in Asia reaches 25%, the program will assign sponsors to projects in Latin America.

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## Filtering Smart Fields By Site

For most types of constituent, marketing, membership, and sponsorship smart fields, you can filter the results by site. You can select sites on the Parameters tab and Site filtering tab.

- Sites selected on the Parameters tab restrict the records included in the smart field calculation. The sites available in the grid are only those you have rights to. If you do not select sites, the smart field is calculated for all sites in the organization.
- Sites selected on the Site filtering tab restrict the smart field so that only users with rights to the selected site can view the field on the Smart Fields tab of constituent records, sponsorship child records, and sponsorship project records.

**Note:** Site settings on the Parameters tab and Site filtering tab work independently of each other and do not have to match.

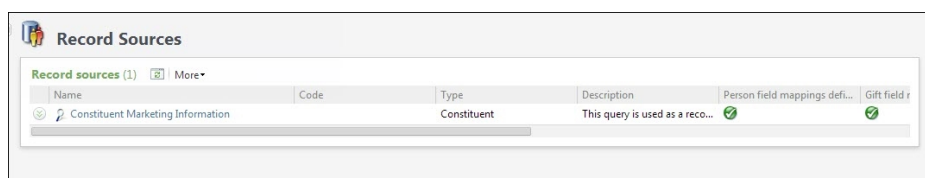
**Note:** The sites available for selection on the Parameters and Site filtering tabs are only those you have rights to.

**Note:** For smart fields based on revenue applications, when you filter by an application selection, if the sites selected in the grid are not the same as those assigned to the application selection, this may result in no records being calculated by the smart field. For example, a selection includes gifts from Site A. When you add this selection to an application amounts smart field assigned to Site B, no records are returned because the sites conflict.

# Record Sources

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Record sources provide the information for constituent, gift, and appeal query views used for creating marketing efforts. While most organization's have only one record source set up during installation and implementation, the program can use multiple record sources. For example, if your organization wants to use data from another program's database, you can add it as a record source.

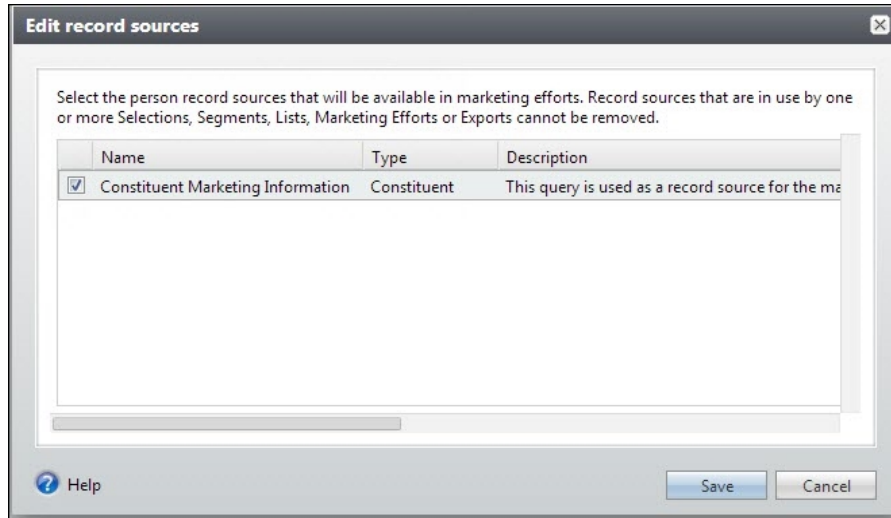


## Add/Remove Record Sources

If you have multiple record sources configured, you can use the Add/remove record source task to remove a record source you no longer use or to add it back for usage. You cannot remove record sources that are currently used by a segment, list, marketing effort, or export.

## > Add or remove a record source

1. From the Record Sources page in *Administration*, click the **Add/remove record sources** task. The Edit record sources screen appears.



The grid lists all available sources established during installation of the program.

2. Select the checkboxes for record sources you want available for marketing efforts.
3. Clear the checkboxes for record sources you no longer want available for marketing efforts. If the record source is currently used by a segment, list, mailing, or export, it cannot be removed.
4. Click **Save**. You return to the Record Sources page.

## Manage Record Sources

The Record Source profile page contains summary information about the record source including the number of selections, segment, lists, efforts, and exports that use data from the record source. You can also view and edit the list code, duplicate criteria, and source analysis rule defined for the record source.

Record source fields are mapped to their equivalent fields in **Blackbaud CRM** during installation and implementation. On the tabs, you can view the mappings for each type of source.

Record Sources  
**Constituent Marketing Information**

Name:	Constituent Marketing Information	Field mappings defined:	✔	Selections:	10,038
Code:		Gift source defined:	✔	Segments:	14
Type:	Constituent	Appeal source defined:	✔	Lists:	4
Description:	This query is used as a record source for the marketing component.	Membership source defined:	✔	Efforts:	11
		Sponsorship source defined:	✔	Exports:	4
		Duplicate criteria defined:	✘		

Person Field Mappings | Gift Field Mappings | Appeal Field Mappings | Duplicate Criteria | Source Analysis Rule

**Person field mappings** | 2

**Personal information field mappings**

Full name:	Name	Title:	Title
First name:	First name	Suffix:	Suffix
Middle name:	Middle name	Household ID:	Household ID
Last name:	Last name/Organization name	Head of household:	Head of household
Org name:	Organization name	Is household:	Is household
Lookup ID:	Lookup ID		

**Donor metrics field mappings**

First gift date:	First gift date	Date last changed:	Date changed
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**Contact information field mappings**

Country:	Country	Addressee:	Addressee
Address line 1:	Address line 1	Salutation:	Salutation
Address line 2:	Address line 2		
Address line 3:	Address line 3	Phone number:	Phone number
Address line 4:	Address line 4	Email address:	Email address
Address line 5:	Address line 5		
City:	City	CART:	CART
State:	State abbreviation	DPC:	DPC
Post code:	ZIP	LOT:	LOT

## Person Field Mappings

The Person Field Mappings tab displays how person fields in the record source map to their equivalent in **Blackbaud CRM**.

### Program Field    Record Source Field

**Full name**            Full name

**First name**            First name

**Middle name**            Middle name

**Last name**            Last name

**Org name**            Organization name

**Lookup ID**            Lookup ID

**Title**            Title (Dr., Mrs., etc.)

**Suffix**            Suffix (Jr., Esq., etc.)

**Household ID**            Unique numeric value assigned to each constituent/spouse relationship

### Program Field    Record Source Field

<b>Head of household</b>	Determines whether the constituent is head of household (1=Head of Household, 0=Not Head of Household)
<b>Is household</b>	Constituent is a household (Yes/No)
<b>First gift date</b>	Date constituent gave first gift
<b>Date last changed</b>	Date constituent record was last changed
<b>Country</b>	Country
<b>Address line 1</b>	Address line 1
<b>Address line 2</b>	Address line 2
<b>Address line 3</b>	Address line 3
<b>Address line 4</b>	Address line 4
<b>Address line 5</b>	Address line 5
<b>City</b>	City
<b>State</b>	State
<b>Post code</b>	Post code
<b>Addressee</b>	Addressee
<b>Salutation</b>	Salutation
<b>Phone number</b>	Phone number
<b>Email address</b>	Email address
<b>CART</b>	Carrier Route
<b>DPC</b>	Delivery Point Code
<b>LOT</b>	Line of Travel

### > Map person fields for a record source

1. From the Person Field Mappings tab of a record source, click **Edit person field mappings** under **Tasks**. The Edit field mappings screen appears with the personal and contact information fields.

**Edit field mappings**

Personal information field mappings

Full name:  Title:

First name:  Suffix:

Middle name:  Household ID:

Last name:  Head of household:

Donor metrics field mappings

First gift date:

Contact information field mappings

Country:  Phone number:

Address line 1:  Email address:

Address line 2:

Address line 3:  CART:

Address line 4:  DPC:

Address line 5:  LOT:

City:

State:

Post code:

2. Under **Personal information field mappings**, select the name, title, or suffix fields in the record source to map to the corresponding fields in the program.

To enable householding, you must map the following fields:

- a. In the **Household ID** field, select the field to map to this record source, for example, "Household ID."
- b. In the **Head of household** field, select the field to map to this record source, for example, "Head of household."

**Note:** When you enable householding, you can select to send one piece of mail only to an entire household, rather than sending a separate piece of mail to each person in the household.

3. Under **Donor metrics field mappings**, select the metrics field in the record source to map to the corresponding field in the program.
4. Under **Contact information field mappings**, select the address, phone, or email fields in the record source to map to the corresponding fields in the program.

For more information about how to map person fields, see [Person Field Mappings on page 177](#).

5. Click **Save**. You return to the Record Source page.



## Person Field Mappings

The table below explains how person fields in the record source map to their equivalent in **Blackbaud CRM**.

### Program Field    Record Source Field

<b>Full name</b>	Full name
<b>First name</b>	First name
<b>Middle name</b>	Middle name
<b>Last name</b>	Last name
<b>Org name</b>	Organization name
<b>Lookup ID</b>	Lookup ID
<b>Title</b>	Title (Dr., Mrs., etc.)
<b>Suffix</b>	Suffix (Jr., Esq., etc.)
<b>Household ID</b>	Unique numeric value assigned to each constituent/spouse relationship
<b>Head of household</b>	Determines whether the constituent is head of household (1=Head of Household, 0=Not Head of Household)
<b>Is household</b>	Constituent is a household (Yes/No)
<b>First gift date</b>	Date constituent gave first gift
<b>Date last changed</b>	Date constituent record was last changed
<b>Country</b>	Country
<b>Address line 1</b>	Address line 1
<b>Address line 2</b>	Address line 2
<b>Address line 3</b>	Address line 3
<b>Address line 4</b>	Address line 4
<b>Address line 5</b>	Address line 5
<b>City</b>	City
<b>State</b>	State
<b>Post code</b>	Post code
<b>Addressee</b>	Addressee

## Program Field    Record Source Field

<b>Salutation</b>	Salutation
<b>Phone number</b>	Phone number
<b>Email address</b>	Email address
<b>CART</b>	Carrier Route
<b>DPC</b>	Delivery Point Code
<b>LOT</b>	Line of Travel

## Gift Field Mappings

Activated marketing efforts use the gift record source to locate all the gifts associated with an effort and calculate performance measures based on the gift amounts.

The Gift Field Mappings tab displays how gift fields in the record source map to their equivalent in **Blackbaud CRM**.

## Program Field    Record Source Field

<b>Gift amount</b>	Gift amount
<b>Gift date</b>	Date constituent gave gift
<b>Donor ID</b>	System record ID (found by selecting File, Properties from constituent record)
<b>Date added</b>	Date the revenue was added to the system
<b>Date changed</b>	Date the revenue was changed in the system. If <b>Date changed</b> is not mapped, the program uses the <b>Date added</b> . If <b>Date added</b> is not mapped, you receive an error.
<b>Do not acknowledge</b>	Whether or not the selected revenue should be included in the acknowledgement process (0=Will be processed, 1=Will not be processed) If integrated with <b>Blackbaud CRM</b> , reads <b>Do not acknowledge</b> flag on revenue record
<b>Do not receipt</b>	Whether or not the selected revenue should be included in the receipt process (0=Will be processed, 1=Will not be processed) If integrated with <b>Blackbaud CRM</b> , reads <b>Do not receipt</b> flag on revenue record If integrated with <b>The Raiser's Edge</b> , reads <b>Do not receipt</b> flag on gift; also excludes already receipted gifts
<b>Lookup ID</b>	Lookup ID
<b>Appeal system ID</b>	System record ID for the appeal (found by selecting <b>File, Properties</b> from an appeal record)

## Program Field Record Source Field

<b>Appeal ID</b>	Appeal ID (from the General tab of the appeal record — must be unique)
<b>Appeal description</b>	Appeal description
<b>Effort ID</b>	Marketing Effort ID
<b>Source code</b>	Source code
<b>Finder number</b>	Finder number

### > Map gift fields for a record source

1. From the Gift Field Mappings tab of a record source, click **Edit gift field mappings** under **Tasks**. The Edit gift record source screen appears.

2. Under **Gift record source**, select the gift record source. This is required to activate a mailing.
3. Under **Field mappings**, select the fields in the record source to map to the corresponding fields in the program. All the fields are required. For more information about how to map gift fields, see [Gift Field Mappings on page 179](#).
4. Click **Save**. You return to the Record Source page.

## Gift Field Mappings

The table below explains how gift fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
<b>Gift amount</b>	Gift amount
<b>Gift date</b>	Date constituent gave gift
<b>Donor ID</b>	System record ID (found by selecting File, Properties from constituent record)
<b>Date added</b>	Date the revenue was added to the system
<b>Date changed</b>	Date the revenue was changed in the system. If <b>Date changed</b> is not mapped, the program uses the <b>Date added</b> . If <b>Date added</b> is not mapped, you receive an error.
<b>Do not acknowledge</b>	Whether or not the selected revenue should be included in the acknowledgement process (0=Will be processed, 1=Will not be processed) If integrated with <b>Blackbaud CRM</b> , reads <b>Do not acknowledge</b> flag on revenue record
<b>Do not receipt</b>	Whether or not the selected revenue should be included in the receipt process (0=Will be processed, 1=Will not be processed) If integrated with <b>Blackbaud CRM</b> , reads <b>Do not receipt</b> flag on revenue record If integrated with <b>The Raiser's Edge</b> , reads <b>Do not receipt</b> flag on gift; also excludes already receipted gifts
<b>Lookup ID</b>	Lookup ID
<b>Appeal system ID</b>	System record ID for the appeal (found by selecting <b>File, Properties</b> from an appeal record)
<b>Appeal ID</b>	Appeal ID (from the General tab of the appeal record — must be unique)
<b>Appeal description</b>	Appeal description
<b>Effort ID</b>	Marketing Effort ID
<b>Source code</b>	Source code
<b>Finder number</b>	Finder number

## Appeal Field Mappings

The Appeal Field Mappings tab displays how appeal fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
<b>Appeal ID field</b>	Appeal ID (from the General tab of the appeal record — must be unique)

## Program Field      Record Source Field

<b>Description field</b>	Appeal description
<b>Inactive field</b>	Determines whether an appeal is inactive (Yes = Inactive, No = Active)
<b>Start date field</b>	Appeal start date
<b>End date field</b>	Appeal end date

### > Map appeal fields for a record source

1. From the Appeal Field Mappings tab of a record source, click **Edit appeal field mappings** under **Tasks**. The Edit appeal record source screen appears.

2. Under **Appeal record source**, select the appeal record source. This is not required, but if you do not specify it, your users will not be able to search for any existing appeals when they activate a mailing. Instead, they will need to enter the appeal name.
3. Under **Field mappings**, select the fields in the record source to map to the corresponding fields in the program. The **Appeal ID** and **Appeal Description** fields are required. The **Inactive**, **Start Date**, and **End Date** fields provide extra information to search for an appeal. For more information about how to map appeal fields, see [Appeal Field Mappings on page 181](#).
4. Click **Save** to save your mappings and return to the Record Source page.

## Appeal Field Mappings

The table below explains how appeal fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
<b>Appeal ID field</b>	Appeal ID (from the General tab of the appeal record — must be unique)
<b>Description field</b>	Appeal description
<b>Inactive field</b>	Determines whether an appeal is inactive (Yes = Inactive, No = Active)
<b>Start date field</b>	Appeal start date
<b>End date field</b>	Appeal end date

## Membership Field Mappings

The Membership Field Mappings tab displays how membership fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
<b>System record ID field</b>	Membership ID
<b>Program field</b>	Membership program
<b>Level field</b>	Membership level
<b>Term field</b>	Membership term
<b>Type field</b>	Membership type
<b>Status field</b>	Membership status (Active or Pending)
<b>Is gift? field</b>	Membership is a gift (Yes or No)
<b>Send renewal to field</b>	Constituent that receives renewal notices
<b>Lookup ID</b>	Lookup ID
<b>Member ID field</b>	Member's record ID
<b>Member name field</b>	Member's name
<b>Given by ID field</b>	Record ID of constituent who gave the membership
<b>Given by name field</b>	Name of constituent who gave the membership
<b>Expiration date field</b>	Date membership expires
<b>Join date field</b>	Date membership began
<b>Last renewed on field</b>	Date membership was last renewed

## ➤ Map membership fields for a record source

1. From the Membership Field Mappings tab of a record source, click **Edit, Membership field mappings** under **Tasks**. The Edit membership record source screen appears.

2. The program maps fields for the membership record source automatically so you should not need to change these settings. If for some reason you need to remap the fields, select the fields in the record source to map to the corresponding fields in the program. For more information about how to map membership fields, see [Membership Field Mappings on page 183](#).
3. Click **Save** to save your mappings and return to the Record Source page.

## Membership Field Mappings

The table below explains how membership fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
<b>System record ID field</b>	Membership ID
<b>Program field</b>	Membership program
<b>Level field</b>	Membership level
<b>Term field</b>	Membership term
<b>Type field</b>	Membership type
<b>Status field</b>	Membership status (Active or Pending)
<b>Is gift? field</b>	Membership is a gift (Yes or No)

Program Field	Record Source Field
Send renewal to field	Constituent that receives renewal notices
Lookup ID	Lookup ID
Member ID field	Member's record ID
Member name field	Member's name
Given by ID field	Record ID of constituent who gave the membership
Given by name field	Name of constituent who gave the membership
Expiration date field	Date membership expires
Join date field	Date membership began
Last renewed on field	Date membership was last renewed

## Sponsorship Field Mappings

The Sponsorship Field Mappings tab displays how sponsorship fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
Child field	Child
Child program field	Sponsorship child program
Gift sponsorship field	Gift sponsorship
Last action field	Last action
Last action reason field	Last action reason
Location field	Sponsorship location
Project field	Project
Project program field	Sponsorship project program
System record ID field	System record ID
Sponsor field	Constituent

### > Map sponsorship fields for a record source

1. From the Sponsorship Field Mappings tab of a record source, click **Edit sponsorship field mappings** under **Tasks**. The Edit sponsorship record source screen appears.



2. The program maps fields for the sponsorship record source automatically so you should not need to change these settings. If for some reason you need to remap the fields, select the fields in the record source to map to the corresponding fields in the program.
3. Click **Save** to save your mappings and return to the Record Source page.

## Sponsorship Field Mappings

The table below explains how sponsorship fields in the record source map to their equivalent in **Blackbaud CRM**.

Program Field	Record Source Field
Child field	Child
Child program field	Sponsorship child program
Gift sponsorship field	Gift sponsorship
Last action field	Last action
Last action reason field	Last action reason
Location field	Sponsorship location
Project field	Project
Project program field	Sponsorship project program
System record ID field	System record ID
Sponsor field	Constituent

## Define Duplicate Criteria for a Record Source

When you import a list, the program uses duplicate criteria to determine which records in the list already exist in the record source. For example, you can specify that for individual constituents, the program compares the first 20 characters in the **First name**, **Last name**, and **Preferred Address/Address Block** fields of constituent records in the source to records in the list to determine if any are duplicates.

### ➤ Define duplicate criteria for list imports

1. From the Duplicate Criteria tab of a record source, click **Edit duplicate criteria** under **Tasks**. The Edit duplicate criteria screen appears.

**Edit duplicate criteria**

Apply duplicate criteria during list import

Fields:

Field Name	Field Length
First name	20
Last name	20
Preferred Address/Address block	50
* [dropdown arrow]	

Save Cancel

- To check for duplicates when you import lists into the program, select **Apply duplicate criteria during list import**. If you clear the checkbox, duplicate processing is removed from the list import process and the **Process duplicates** task is not available on the Acquisition Lists page. In most cases, you will probably want to use duplicate checking, but you may want to turn it off if you use a duplicate criteria checking mechanism other than the default one included with the program.
- In the grid, select a field in the **Field Name** column and enter a corresponding character count in the **Field Length** column. Under **Field Name**, the down arrow displays all possible field entries.
- Add as many rows as necessary to define your duplicate criteria.
- Click **Save**. You return to the Record Source page.

## Select Source Analysis Rule Fields for a Record Source

A source analysis rule is a way to store the state of selected attributes for constituents in a record source when you send a marketing effort. You can think of a source analysis rule as a snapshot of a donor's attributes at a specific time. For example, in one source analysis rule, you want to capture Membership Status and Giving Level information for your donors. When you capture this information, you can record over time how your marketing efforts impact the constituents included in the selected membership or giving level. Source analysis rules do not apply to donors included as part of an acquisition list.

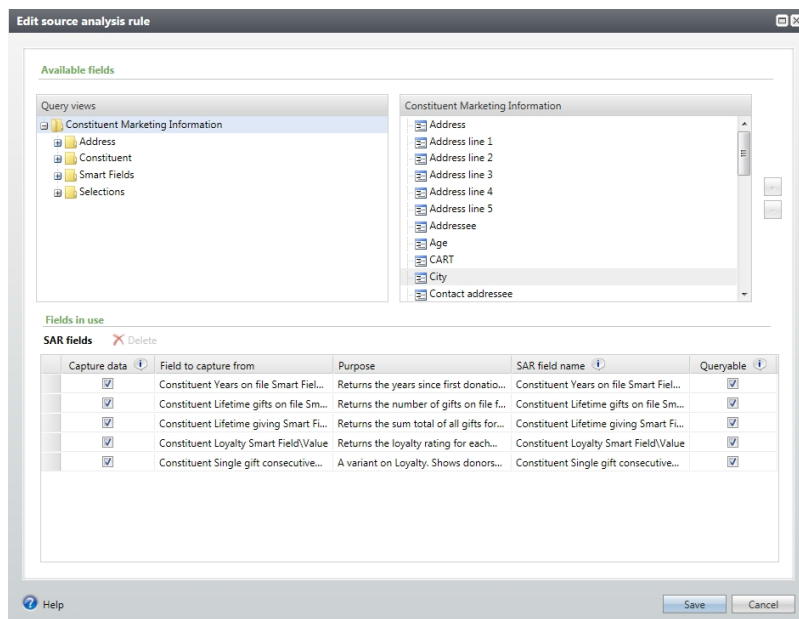
To create a source analysis rule, you select the captured data fields from smart fields, selections, and fields associated with the Constituent query view. When you activate a marketing effort, the program automatically stores the current value for each field of a source analysis rule, and links this information to the marketing effort and segment.

You can generate a Source Analysis Response Report to view the source analysis values for a specific record source. For more information about the Source Analysis Response Report, see the Reports chapter of the *Marketing Efforts Guide*.

### ➤ Select source analysis rule fields

1. From the Source Analysis Rule tab of an active record source, click **Edit source analysis rule fields** under **Tasks**. The Edit source analysis rule screen appears.

**Note:** You can define only one source analysis rule per record source.



2. Under **Available fields**, the list on the left displays the query views available for the record source. When you select a query view, the list on the right displays all fields included in that view. To include a field in the source analysis rule, drag and drop the field or select the field and click the + button. The field appears in the **Fields in use** grid at the bottom.
3. The **Capture data** option is selected by default for all fields you add to the grid. If you deselect **Capture data** for a field, the program no longer captures its data for reports and queries. However, data from earlier captures is still available.  
To remove a captured data field permanently from all reports and queries, select the field and click **Delete**.
4. The **Field to capture from** column displays the captured field's name. In the **SAR field name** column, enter a name to identify the captured data in reports and queries. For example, "SAR–Constituent Lifetime Giving."
5. To explain why you included a specific field in the source analysis rule, enter a description for the field in the **Purpose** column.
6. The **Queryable** option is selected by default for all fields so they will appear in ad-hoc queries. If you use a large number of SAR fields, you can deselect **Queryable** for any fields

that you do not need available in queries. If you deselect **Capture Data**, you may leave **Queryable** selected so you can still query historical data.

7. Add as many fields as you need to create a source analysis rule.
8. Click **Save**. You return to the Record Source page.

## Source Analysis Rules Smart Fields

The table below explains the smart fields for source analysis rules. These fields are provided as defaults in the program. For more information about smart fields, see [Smart Fields on page 137](#).

**Warning:** Before you activate any marketing efforts for the selected record source, you must first process any smart fields for the source analysis rule. Because the program processes the smart fields separately from the source analysis rule, if you activate a mailing without processing the smart fields, the information the fields display may be out of date.

Smart Field	Description
<b>Ask Ladder</b>	This smart field displays entry amounts for ask ladders in the date and amount ranges you select. The entry amount is the value from a constituent's giving history that you use to calculate the ask amounts.
<b>Lifetime gifts on file</b>	This smart field displays the total number of gifts to your organization from a constituent.
<b>Lifetime giving</b>	This smart field displays the total amount given to your organization by a constituent.
<b>Loyalty</b>	This smart field defines member status in terms of New Donor, Multi Year donor, Lapsed Donor, and Reactivated Donors.
<b>Single gift consecutive year donors</b>	This smart field displays all donors who gave a single direct mail gift consecutively for the past five years.
<b>Years on file</b>	This smart field displays the number of years since the constituent's first donation.

## Define a Record Source List Code


You can define a code to identify members of this record source in source codes. The list code helps you distinguish members of this source from members of other sources or lists.

### ➤ Define a list code for a record source

1. From a record source, click **Edit list code** under **Tasks**. The Edit record source list code screen appears.

**Edit record source list code**

This 'List Code' can be used as part of a Source Code to distinguish members of this record source from those in other record sources and in acquisition lists.

Code:   L + 3 digits, or 'LC' plus list ID

Save Cancel

2. Enter the code to identify members of this record source.

The code you enter must meet the formatting requirements of at least one source code layout that includes a list code. The valid formats for list codes for all layouts that include one appear beside the field. A valid code is indicated by a green check mark. For more information about source codes and source code layouts, see the *Marketing Efforts Guide*.

3. Click **Save**. You return to the Record Source page.

# Optional Modules

## Unlock Optional Modules .....190

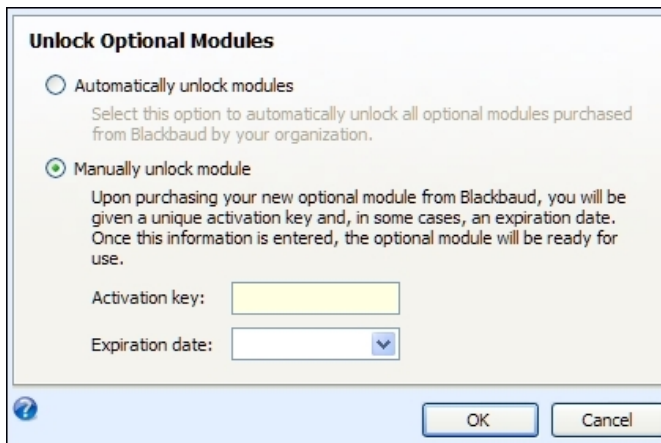
Optional modules enable you to customize the program to meet specific needs of your organization. When you purchase an optional module from Blackbaud, you receive an activation key. You can use this key to unlock the module and access its features.

## Unlock Optional Modules

You can automatically unlock all your optional modules based on information specific to your installation. You can also select to unlock a specific optional module with a unique activation key received from Blackbaud.

### > Unlock optional modules

1. On the menu bar, click **Welcome** and select **Unlock optional modules**. The Unlock Optional Modules screen appears.



**Unlock Optional Modules**

Automatically unlock modules  
Select this option to automatically unlock all optional modules purchased from Blackbaud by your organization.

Manually unlock module  
Upon purchasing your new optional module from Blackbaud, you will be given a unique activation key and, in some cases, an expiration date. Once this information is entered, the optional module will be ready for use.

Activation key:

Expiration date:

OK Cancel

2. Select whether to automatically unlock all modules or manually unlock a single module.  
If you select **Manually unlock module**, enter the activation key received from Blackbaud to unlock the module. If you receive an expiration date for the module, in the **Expiration date** field, select the date the module expires.
3. Click **OK**. You return to the previous page.