

## New Features Guide

07/18/2023Blackbaud CRM 4.0 New Features US

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NewFeatures-2023



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Before you upgrade and begin to use **Blackbaud CRM 4.0**, take a moment to review the following information that highlights new features and changes to existing features. We also recommend you review information about [CRM 4.0 Service Pack new features](#). It is important to share this information with **CRM** users in your organization.

**Note:** In addition to the PDF, we also provide Microsoft *Word* versions of each New Features Guide for **Blackbaud CRM** 2.91 and higher. You can [download a \\*.zip file](#) of these documents to easily copy and reorganize the content to best suit your needs. The conversion of these PDF files into *Word* does not always maintain consistent formatting, so there may be slight irregularities.

## ClickOnce Support

Blackbaud will support ClickOnce (“Smart client”) through the end of support for **CRM** version 3.0, which is expected to conclude December 31, 2016. The 4.0 **CRM** release does not include support for ClickOnce.

The replacement interface, WebUI, is the sole interface supported in this release and will be the only one supported in future versions. WebUI was first introduced in **CRM** version 2.93 released in May of 2012. As of the 3.0 release, all the functions available in ClickOnce are available in WebUI, have a functional equivalent, or were intentionally retired. Details of these changes are outlined in the *Introduction to WebUI Guide*.

ClickOnce on version 3.0, and all prior supported versions, will continue to receive the benefit of our quality assurance testing and maintenance corrections in both ClickOnce and WebUI, and we will seek to reasonably address any critical software defects related to ClickOnce in these versions.

Although we took precautions to avoid them, functionality differences may exist between WebUI and ClickOnce. If you notice differences, please contact our Support department so we can evaluate the best approaches to address the issues.

After you upgrade to **CRM** version 4.0, an error message appears when you use a ClickOnce link. The message explains that the link is no longer valid and that you should contact your system administrator for a new one.

**Tip:** We recommend system administrators proactively distribute the WebUI link and instruct users to update their direct links, such as those saved to web browser favorites lists.

## Upgrade Considerations: Tasks and System Roles

In **Blackbaud CRM 2.91** and subsequent versions, we made enhancements to several of the main functional areas, including *Events*, *Prospects*, and *Memberships*. Before we made these enhancements, you could customize the functional areas by assigning tasks to a system role. These tasks then appeared on the functional area. You could also specify which task groups they should appear in, such as under

**Configuration** or a custom task group you created. This was an easy way to offer "shortcuts" to users that would appear in the functional areas they could access.

These functional areas were converted to actual pages to improve functional flexibility and overall usability. While you cannot assign tasks to pages, pages can have actions. After you upgrade, you will need to re-create any tasks as actions and add them to these pages. To add actions to these pages, you must edit the page properties while in design mode.

Most tasks are available as actions, except for `BrowseQueryResults` and `RunBusinessProcess`. In addition, you can now take advantage of the actions `ActionGroup`, `ExecuteCustomSectionMethod`, and `InvokeSectionModelAction`, which are not available as tasks.

You can create custom action groups, similar to custom task groups. When you create a custom action group, you can choose where to display it on the screen. By default, custom action groups appear on the left side of the screen above the Shortcuts, Recent searches, and Recently accessed lists. To change the placement of the action groups, click **Edit action groups** in design mode. Select the action group you want to edit and use the `RenderLocation` field on the Action group screen to change the location. Placement for the action group defaults to "ExplorerBar," which places the action group on the left side of the screen where the group was located before. However, you can select "Tab" if you want the action group to appear on the page instead.

**Note:** If your organization has not assigned tasks to system roles, you do not need to take additional action for this after you upgrade.

If your organization has assigned tasks to system roles, you will need to re-add these as actions to place on the *Events*, *Prospects*, and *Memberships* pages.

## Before You Upgrade

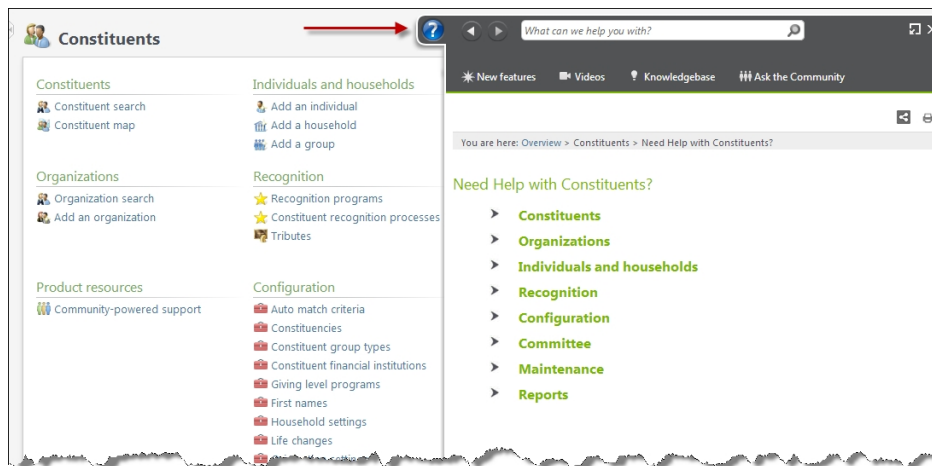
Before you upgrade and begin to use **Blackbaud CRM 4.0**, we recommend you review information about **CRM 3.0** Service Pack new features, in addition to all other relevant new feature information. For more information about Service Pack new features, [refer to Chapter 2 in the 3.0 New Features Guide](#).

You should commit all open batches before you upgrade to **CRM 4.0**.

## Online Help Panel

With this release, we made significant enhancements to our Help offering.

We designed a tabbed panel to bring online Help topics directly into the program. The new Help Panel offers improved usability with a modern update. When you click **Help**, a panel appears from the right side of your screen and displays content specific to your page or screen.



With the new Help Panel, you can quickly access:

- New feature content
- The latest, most up-to-date Help topics from service pack new features and additional content improvements
- Feature videos

You can also:

- Undock the Help Panel to click and drag the help to a different position
- Click breadcrumbs to find your way back to your original topic
- Use navigation buttons to go back and forth in your Help Panel history
- View improved images

**Tip:** To accommodate the new placement of the **Help** button, we relocated several links. On the Home page, the **Customize** link now displays next to **Home**. Where applicable, navigation trees display next to a page name. Finally, **About Blackbaud CRM** now appears in the Welcome menu. For details about these new locations, see [General Features on page 39](#).



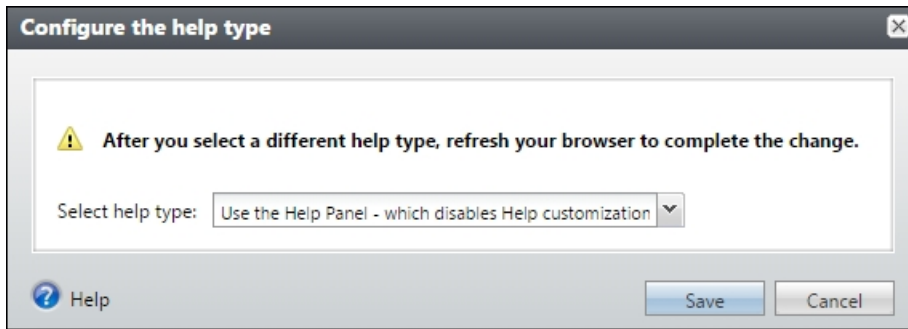
## Configure Help Type

With this release, the online Help Panel is available and is set as the default help type.

However, to continue using customized Help topics for your organization, your system administrator has the option to revert back to the 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:** 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. Also note that the new Help Panel is not compatible with the tools used to customize the Help file. Blackbaud will continue to explore a supported model of custom Help file content as a modern, cloud-based software provider. When available, we anticipate the ability to convert Help topic content into the new model.

## Help Panel Glossary

With this release, a glossary has been added to the help file. This glossary contains definitions for terms that are important to know or concepts that are difficult to understand and will help provide context throughout the help panel.

Glossary terms appear in key locations within topics in the help file. To view the glossary term, hover over it with your cursor. The definition appears.

## New Code Tables and Configuration Tasks

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

determine the values to use with the code table. This release includes the new configuration tasks and code tables below.

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

## New Code Tables

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

- [Research Lists on page 56](#)
- [Additional Household Information from Experian on page 62](#)

## New Configuration Tasks

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

- [Anonymous Recognition Options on page 86](#)
- [Recurring Gift Status Changes on page 91](#)
- [Communication Templates on page 29](#)
- [Communication Name Patterns on page 32](#)
- [Configure Help Type on page 8](#)

## Enhanced Configuration Tasks

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

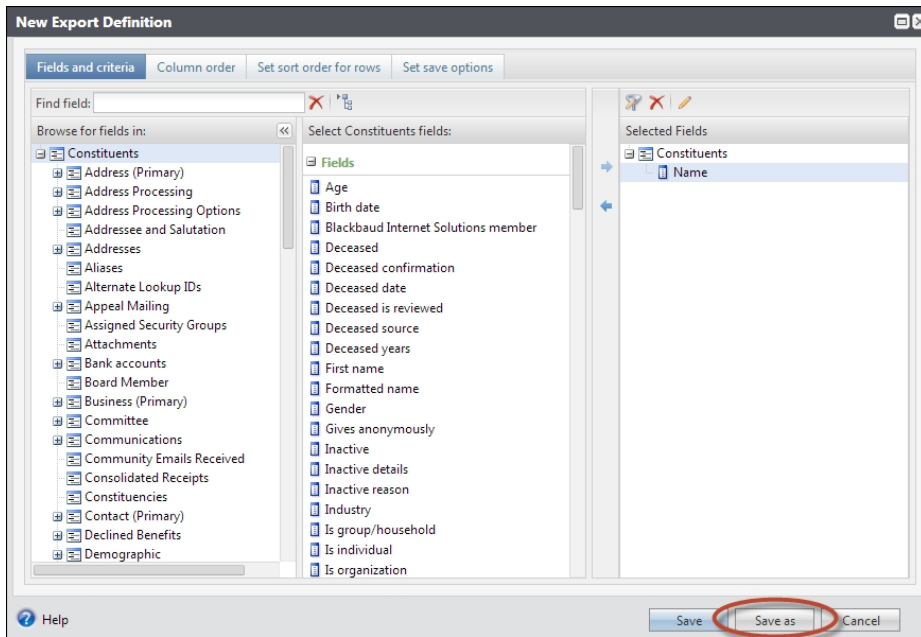
- [Post Membership Installment Plans on page 47](#)

## Administration

### Save As Option for Export Definitions

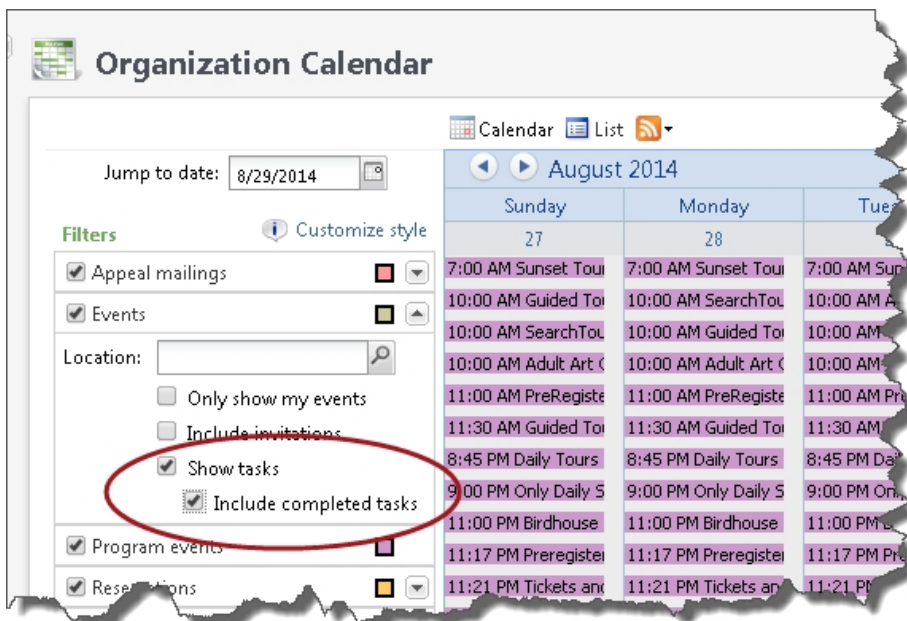
A new **Save as** option is available when you create and edit export definitions on the Export definitions page in *Administration*. This allows you to change existing export definitions while they are open and save them as new definitions. Previously, you copied definitions to create new versions of them. This

enhancement reduces the number of steps to update existing definitions so you can work more efficiently.



## Filter the Organization Calendar by Event Tasks

When you use the Events filter for the organization calendar, you can now select **Show tasks** to include the event's related tasks. Select **Include completed tasks** to also include completed tasks related to the event.



# Batch

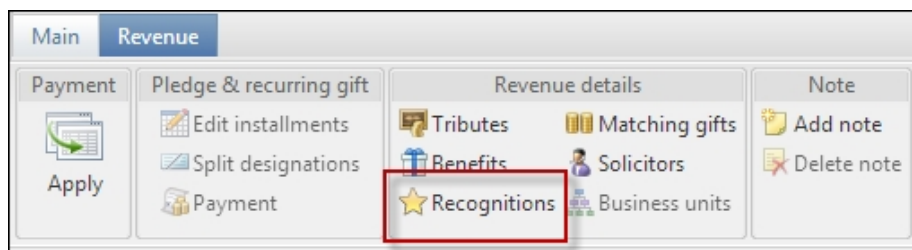
## Column Widths in Batches

When you resize a column width in a batch template, the adjusted width remains in place for that template until you resize it again. For example, if you widen the size of a column, the next time you use that batch template the column is displayed in the new size instead of the default size. Previously, the column size did not save and reset to the default each time you accessed the template. This is a per-user setting, so your width changes do not carry over to other uses of the program.

## Edit Recognition Credits in Batch

Recognition credits currently provide flexibility for crediting constituents for a transaction. For example, you can credit additional constituents for the revenue and decide how much credit each constituent receives. With this release, you can now edit recognition credits associated with commitments, such as pledges or recurring gifts, when added through an Enhanced Revenue Batch and a Revenue Update Batch. This enhancement adds greater flexibility and a more streamlined data entry experience.

To edit the recognition credit for a commitment from the Revenue tab of the batch data entry screen, select a payment row and click **Recognitions** on the toolbar.



From the Recognitions screen, you can change or add additional constituents.

**Recognitions**

Pledge for Max G. Taylor

Total amount: \$500.00

Constituent	Amount	Recognition credit type	Effective date
Max G. Taylor	\$500.00	Donor	6/12/2014
Michelle and Max Taylor	\$500.00	Household	6/12/2014
*			

Distribute ▾

Help OK Cancel

For commitments associated with multiple applications, from the Recognitions screen, you must first click **Assign recognitions** before you can edit or add new recognition credits.

**Recognitions**

Payment for Max G. Taylor

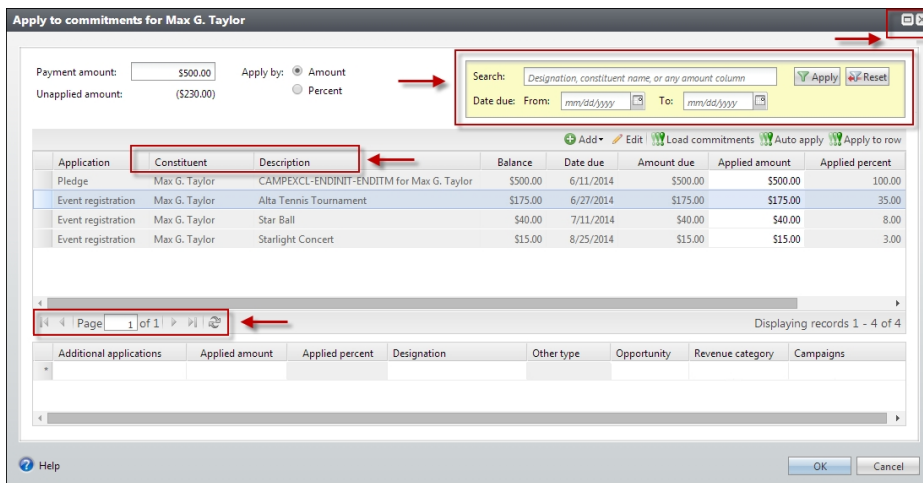
★ Assign recognitions

Application	Recognition recipients
2005ME...	Max G. Taylor

## Apply to Commitments Screen in Batch

With this release, we made several enhancements to the Apply to commitments screen accessed from an Enhanced Revenue Batch and Revenue Update Batch. These enhancements improve the use and efficiency of this screen.

**Show Me:** [Review the walkthrough to learn more](#)



- To view a large amount of information at one time, you can now click the maximize button in the top right corner of the Apply to commitments screen. Once maximized, to return to the default screen size, click maximize again. To manually resize the screen, you can click and drag any corner of the screen.
- Use new search filter options to filter the list of the constituent's existing commitments based on designation lookup ID or name, constituent name, or amounts. You can also filter across due dates.

**Note:** This filtering only searches through the constituent's list of existing commitments. To search for commitments owned by other constituents, click **Load commitments** on the action bar.

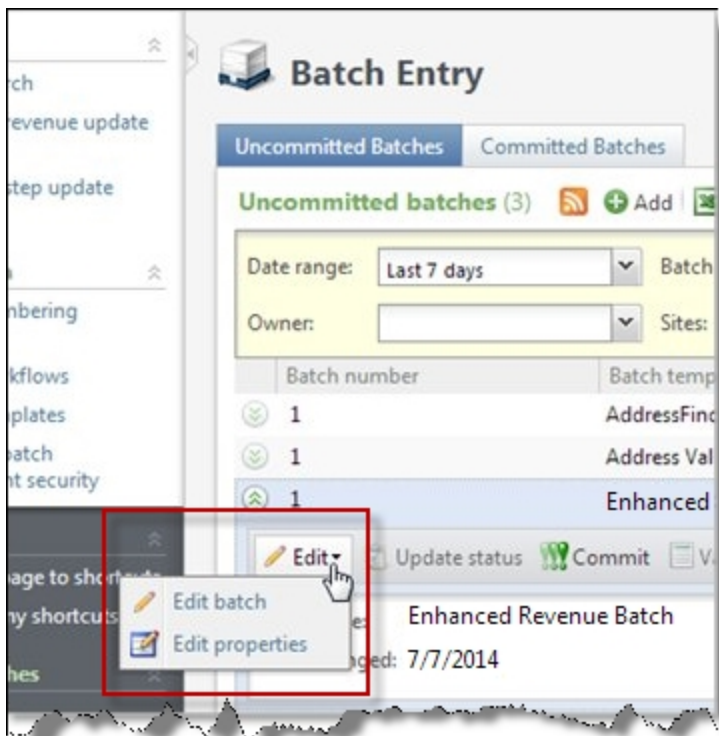
- Previously, the **Description** column displayed the designation or event lookup ID as well as the associated constituent name. For easier identification and sorting, the **Description** column now displays the designation or event lookup ID and the new **Constituent** column displays the associated constituent name.

**Note:** When upgrading, note that these usability enhancements also apply to existing batches.

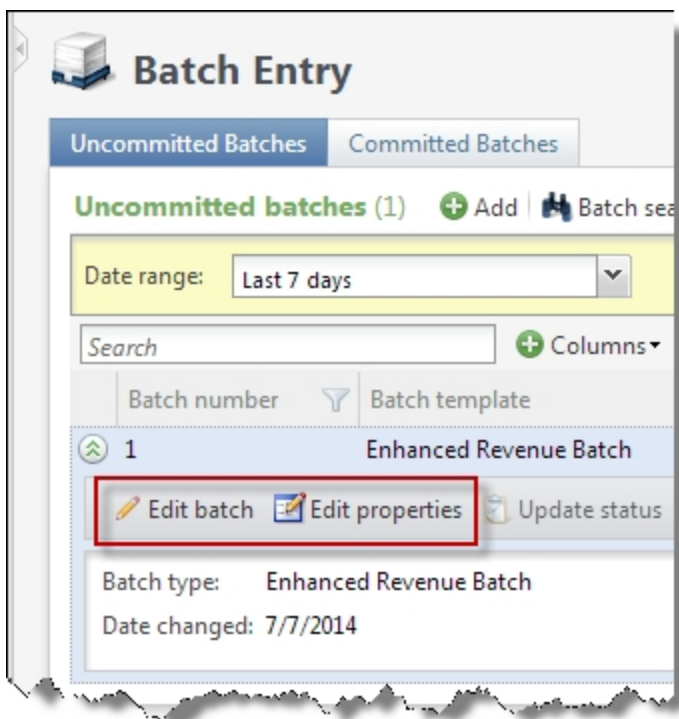
- To quickly locate information, you can now sort the grid by clicking any column header.
- The commitments grid now supports pagination. Use the **Page** field and page arrows to easily navigate between groups of commitments. The grid displays 25 commitments per page.

## Action Bar for a Batch Row

We enhanced the action bar for a batch row for all batch types. On the Uncommitted Batches tab, click the double arrows next to a batch to expand its row. From the action bar that appears, we removed the **Edit** drop-down button that previously included **Edit batch** and **Edit properties**.



With this release, we added the **Edit batch** and **Edit properties** buttons directly to the batch action bar. This saves time by eliminating an extra click when you need to edit a batch or its properties.



# Batch and Import Guide Enhancements

With this release, we made a significant investment in improving the quality of our existing User Education resources. One such area of improvement focused on the [Batch and Import Guide](#) and associated help file content.

The following list highlights several of our enhancements:

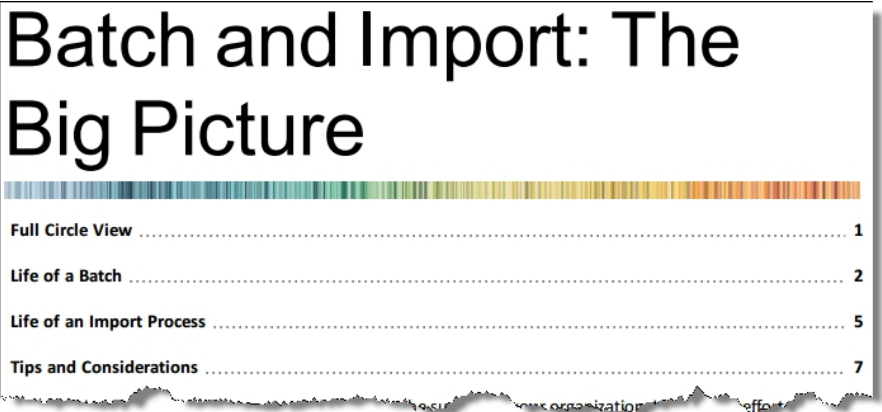
- We tested and updated content to ensure accuracy and provide a more logical flow of information.
- We created new How-To videos to visually enhance your understanding of *Batch* and *Import*.

**Show Me:** [Watch this video for a high-level overview of Batch](#)

**Show Me:** [Watch this video for a high-level overview of Import](#)

**Show Me:** [Watch this video to learn how to apply payments to commitments in Batch](#)

- We added a new "Big Picture" chapter that offers an overview of *Batch* and *Import*, and describes how they work together to save time and promote consistent data management.

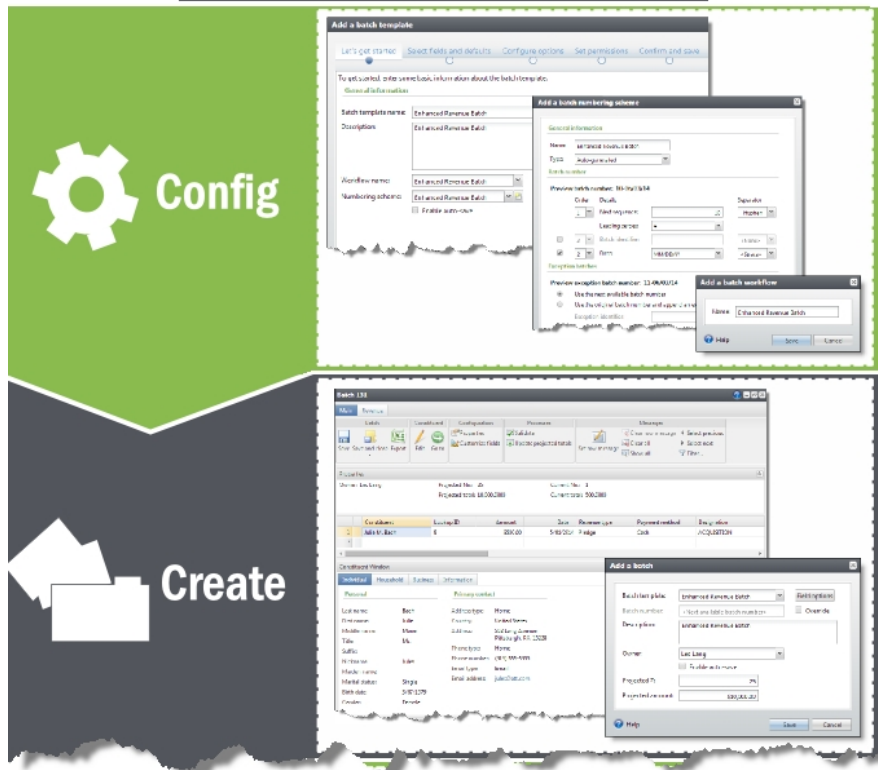


<b>Batch and Import: The Big Picture</b>	
<hr/>	
Full Circle View .....	1
Life of a Batch .....	2
Life of an Import Process .....	5
Tips and Considerations .....	7

This chapter also illustrates the life cycle of a batch and import process, and provides tips and considerations to enhance your workflow.



## Workflow - Life of a Batch



- To help you more clearly understand the validation process, we added more detail to our list of validation errors and the reasons for their occurrence.

### Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

#### Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see *Customize the Fields in a Batch* on page 70.

#### Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

#### Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see *Resolve Duplicate Constituents in a Batch* on page 118.

#### Account or account segment errors

Ensure the GL mapping is up-to-date or the segment is defined. For more information, see the *GL Setup Guide*.

## Batch Lockdown for Credit Card Processing

When you run a Credit card processing process, we now lock the batch while the cards are being processed so that a user cannot change information about a transaction that has already been sent to the **Blackbaud Payment Service**. After the cards are processed, the batch is unlocked. Previously, the batch was not locked and payment information could be changed while the cards were processed which could cause a mismatch between the transaction information in **CRM** and in the **Blackbaud Payment Service**.

## Constituents

### Constituent Record Redesign

We have redesigned the constituent record to make it easier and faster to find information about your constituents. The record now includes summary tiles where the summary section used to be, and information that was previously accessed through the left navigation is now easily available within the record itself.

**Joseph Abrahms**  
Individual    Lookup ID: 8-10000141  
Constituencies: Relation only

Personal Information	Contact Information	Addresses	Primary Relationships
 <b>Mr. Joseph Abrahms, Sr.</b> Nickname: Joe Maiden:	Primary phone Primary phone Primary email Primary email	Home (Current)	Spouse Spouse Household Add to household Primary business

Documentation and Interactions	Memberships	Education
Notes: 0 Media links: 0 Attachments: 0 Interactions: 0	ID: Expiration: Level: Member since:	Institution: Degree: Class of: Status:

↑ Show less    ⚙️ Customize tiles

Summary	Contact	Personal Info	Relationships	Revenue	Memberships	Documentation and Interactions	Communications	History	Smart Fields	Security						
<b>Revenue summary</b> View all revenue    Recent revenue <table border="1"> <tr> <td>Total revenue:</td> <td>\$0.00</td> </tr> <tr> <td>Membership revenue:</td> <td>\$0.00</td> </tr> <tr> <td>Event revenue:</td> <td>\$0.00</td> </tr> </table>											Total revenue:	\$0.00	Membership revenue:	\$0.00	Event revenue:	\$0.00
Total revenue:	\$0.00															
Membership revenue:	\$0.00															
Event revenue:	\$0.00															
<b>Recent and upcoming activities</b> Recent and upcoming communications    View all																

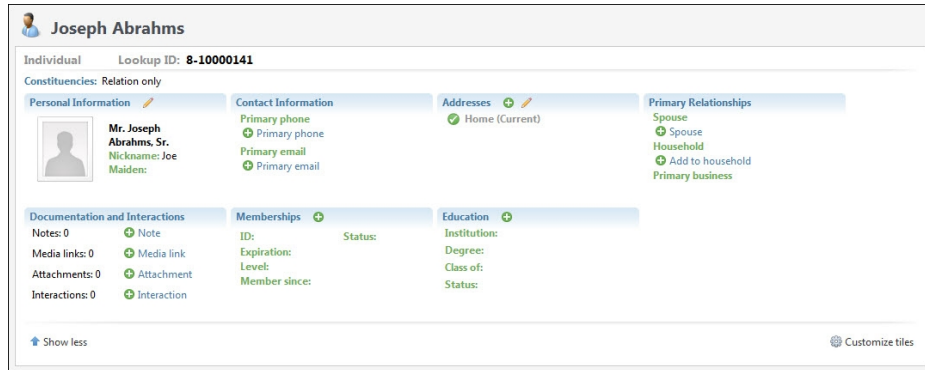
## Constituent Tiles

The constituent record now includes summary tiles where the constituent summary section used to be. You can add and edit constituent information from the tiles, and you can use them to quickly navigate through the record.

Tiles and the related tabs are linked. When you click a tile name, the related tab opens. Some tiles may include links to other constituent records. For example, for a household record type, you can use the Members tile to open the individual records of the constituents included in the household.

Some tiles also include multiple pages of entries. For example, if a constituent has more than one address, you can use the arrows on the Addresses tile to view each address.

Above the summary tiles, the record type, lookup ID, and active constituencies are always visible. Important notifications, such as deceased status, also appear above the tiles.



For each constituent record types, users can customize which summary tiles appear as well as what order they appear in. This setting is saved for your user account the next time you access a record or log in.

There is no limit to how many tiles you can choose to view. Tiles wrap to fit your screen size. To select what tiles appear and in what order, click **Customize tiles**.

To hide the tiles for ease of navigation, click **Show less**. When tiles are hidden, click **Show more** to display them again.

**Note:** Users who had security access to the summary section of constituent records can see all tiles in the new layout. This is true even for tiles that have information about sections of the program that the user may not have access to. For example, if a user has rights to see the constituent summary section but no rights to see membership information, they will still be able to see the new Membership tile on constituent records.

If you have a customization for the constituent summary section that has replaced the standard data form with a custom data form, the upgrade will not overwrite your customization with the new tiles. However, if you wrote an extension to the data form, the upgrade will replace your extension with the new tiles. To customize the section, you must rewrite the extension.

## Constituent Record Tabs

In order to make it easier to find the information you need about your constituents, pages that you previously accessed from the More information or the View as area on the left navigation are now part of the main record tabs. On a constituent record, there are now new tabs that incorporate this information in a central place.

To make it easy to navigate this information, we made some enhancements to the way tabs work.

- You can now drag and drop tabs into any order you prefer. This is sticky setting, so it is saved the next time you access a constituent record. This allows you to organize the tabs in the order that

most makes sense for your workflow.

- When you scroll through tabs using the right and left arrows at either side of the tabs, the tabs now scroll more quickly. This allows you to scroll through several tabs at one time and makes it easier to find what you are looking for.
- Most tabs now have second-tier tabs inside. This allows you to navigate through information within a section in a similar way to how you did inside pages such as the Relationships page. The second-tier tabs behave the same as first-tier tabs.

Below is a list of all tabs and pages currently in the application. Where appropriate, we have noted their previous location and second-tier tabs.

<b>Tabs and Pages</b>	<b>Previous Location</b>	<b>Second-Tier Tabs</b>	<b>Notes</b>
Communications	Communications under More information	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Appeals</li> <li>• Preferences</li> <li>• Newsletters</li> </ul>	
Corporate Info	More information	No second-tier tabs	Only applicable to organization records.
Documentation and Interactions	Documentation Tab and Documentation Summary, Interactions, and Surveys under More information	<ul style="list-style-type: none"> <li>• Constituent Documentation</li> <li>• Interactions</li> <li>• Surveys</li> </ul>	
Fundraiser	View as Fundraiser		This page is still accessible as a separate page.
Funds Received	Funds received page	None	Only appears for constituents who received funds.
History	History under More Information	<ul style="list-style-type: none"> <li>• History</li> <li>• Origin</li> </ul>	
Personal Info	Personal Info and Constituencies tabs	<ul style="list-style-type: none"> <li>• Personal</li> <li>• Constituencies</li> </ul>	We have consolidated the Personal Info and Constituencies tabs under the Personal Info tab.

Tabs and Pages	Previous Location	Second-Tier Tabs	Notes
Relationships	Relationships tab / View as Group member page	<ul style="list-style-type: none"> <li>Relationships</li> <li>Group Member</li> <li>Relationship Tree</li> <li>Extended Relationships</li> <li>Relationship Maps</li> </ul>	
Sponsor	View as Sponsor	<ul style="list-style-type: none"> <li>Sponsorships</li> <li>Transactions</li> </ul>	
Stewardship plans	Stewardship plan page		
Vendor	View as Vendor		
Volunteer	View as Volunteer	<ul style="list-style-type: none"> <li>General</li> <li>Availability</li> <li>Timesheets</li> <li>Awards</li> <li>Documentation</li> </ul>	The previous Traits tab on the Volunteer page is now part of the General tab inside the Volunteer tab.

**Note:** If you have customizations on any of the pages that are now tabs on the constituent record, the upgrade will make those customized pages inaccessible. However, Blackbaud has created a utility your system administrator can run after the upgrade to copy the customizations to the new tabs. The utility is available on the Downloads page of the [Blackbaud website](#) or by contacting Blackbaud Customer Support.


## Other Enhancements to the Constituent Record

In alignment with the new design of the constituent record, we have made additional changes to the way tasks are organized on the page.

You can now mark a constituent as deceased or inactive from the Personal Info tab on the constituent record. For organization records, the option to mark the organization as inactive is now on the Organization Info tab. Previously, these options were located under **Tasks**.

**Individual**      **Lookup ID: 3**

Constituencies: [Trustee](#)   [Major donor](#)   [Event registrant](#)   [Volunteer](#)

<b>Personal Information</b>  <b>Mr. Mark Daniel Adamson, III</b> Nickname: Maiden:	<b>Contact Information</b> Primary phone 843-798-6698 (Home) Primary email madamson@sncn.net (Email)	<b>Addresses</b> +   (1 of 5)   < > 555 test charleston, Home (Current)
<b>Primary Relationships</b> Spouse + Spouse Household + Add to household Primary business Charleston Development Corporation	<b>Documentation and Interactions</b> Notes: 1   + Note Media links: 0   + Media link Attachments: 0   + Attachment Interactions: 0   + Interaction	<b>Memberships</b> + ID:   Status: Expiration: Level: Member since:


[Show less](#)      [Custom](#)

---

Summary   Contact   **Personal Info**   Relationships   Revenue   Sales Orders   Memberships   Volunteer   Documents

Personal   Constituencies   Education

Expand all   Collapse all

☒ **Personal information**   Edit   
 ☒ Mark deceased   
 ☒ Mark inactive   
 

First name: Mark  
 Middle name: Daniel  
 Last name: Adamson  
 Title: Mr.  
 Suffix: , III  
 Nickname:

Title 2:  
 Suffix 2:  
 Gender: Male

## Constituent Search

When you click **Show advanced search options** on the Constituent Search screen, your selections under **Advanced search options** remain in place each time you access the screen. For example, when you select **Include deceased**, the checkbox remains selected and deceased constituents appear in results each time you open the screen until you clear the checkbox. These selections also carry over to the quick search bar at the top of every screen.

**Constituent Search by Name or Lookup ID**

Name/Lookup ID:  Address:

Last/Org/Group name:  City:

First name:  State:

Lookup ID:  ZIP:

☐ Match all criteria exactly

**Advanced search options**

Search in: ☐ Individuals ☐ Organizations ☐ Groups/Households

☐ Check nickname ☐ Only search primary addresses

☐ Check aliases ☒ Include deceased

☐ Check alternate lookup IDs ☐ Include inactive

☐ Check merged constituents ☐ Include fuzzy search on name

Hide advanced search options

**Results**

Lookup ID	Name	Constituent type	Address	City	State	ZIP/Postal code
-----------	------	------------------	---------	------	-------	-----------------

Help
 Select
 Cancel

The advanced options you select are specific to your user account. Other users are unaffected and select their own advanced options.

## Campaign Filters for Constituent Revenue and Recognition Information

To help improve both performance and usability when viewing revenue and recognition information on constituent records, we have made an enhancement to the way the campaign filters on the Revenue Summary and Revenue History tabs work. When you view these tabs and you choose to view the information by "Selected campaigns," the Select campaigns screen now includes only campaigns the constituent has given to and, for context, the associated parent campaigns in the hierarchy. Previously, the campaign filter on these tabs included the complete campaign hierarchy even if the constituent did not give to the campaigns.

**Mark D. Adamson**

Notifications: "Board member". Click here for more information.

Individual Lookup ID: 3

Constituencies: Trustee Major donor Member Recognized donor Event registrant Volunteer

**Personal Information**

Mr. Mark Daniel Adamson, III  
Nickname: Madamson  
Maidens:

**Contact Information**

Primary phone: 843-798-6698 (p) (Home)  
Primary email: madamson@sncn.net (Email)

**Addresses** (1 of 6)

125 Smokerise Way  
Charleston, SC 29401  
Home (Current)

**Primary Relationships**

Spouse  
Household  
Add to household  
Primary business  
Charleston Development Corporation

**Documentation and Interactions**

Notes: 1  
Media links: 0  
Attachments: 0  
Interactions: 1

**Memberships**

Colors  
Mark D. Adamson  
ID: 8-10197475 Status: Active  
Expiration: 5/16/2015  
Level: Red  
Member since: 5/16/2014

Show less Customize tiles

Summary Contact Personal Info Relationships **Revenue** Memberships Volunteer Documentation and Interactions Communications Attributes Events Smart Fields Security

Revenue Summary **Revenue History** Recognition Recognition Summary Recognition History Gifts Tributes Accounts

**Revenue history (21)**

Group by: Commitment Type: All Date range: Specific date range

Revenue type: All Campaigns: All campaigns Start date: 1/1/2014 End date: 12/1/2014 Apply Reset

Revenue filter: Claims (NP, PG & Gifts) Sites: All sites

## Letter Owner

You can now assign an owner to a letter that you send to a constituent. When your user account is tied to the constituent, the new **Owner** field defaults to you, but you can assign a different user as the owner of the letter if necessary. To write a letter to a constituent, from the constituent record, click **Write a letter** under **Tasks**.



Write a letter

Letter

Letter name:

Letter template:

Address

Addressee:

Address:

Salutation:

Edit letter

1) Download letter:

2) Make changes in preferred editor.

3) Upload your changes:

Details

Mail date:

Owner:

Interaction type:

Category:

Specific Date Range Filters on the Revenue and Recognition History and Summary Tabs

To improve performance and to give you a more precise view of information on the Revenue History, Revenue Summary, Recognition History, and Recognition Summary tabs of a constituent, you can now filter by "Specific date range" and select the exact start and end dates to use. Previously, you could filter by fuzzy dates only, such as "Last month" or "This calendar year."

The screenshot displays the constituent profile for Mark D. Adamson. The top section includes a notification about being a "Board member" and a "Lookup ID: 3". Below this, various tabs are visible: Summary, Contact, Personal Info, Relationships, Revenue, Memberships, Volunteer, Documentation and Interactions, Communications, Attributes, Events, Smart Fields, and Security. The "Revenue" tab is selected, showing sub-tabs for Revenue Summary, Revenue History, Recognition, Recognition Summary, Recognition History, Gifts, Tributes, and Accounts. The "Revenue History (21)" sub-tab is active, displaying a list of revenue items. A red arrow points to the "Date range" dropdown menu, which is currently set to "Specific date range". Below this, the "Start date" is set to 1/1/2014 and the "End date" is set to 12/1/2014. The "Apply" and "Reset" buttons are visible at the bottom right of the filter section.

## Constituent Data Hygiene Processes

### Constituent Merge Configuration for Employment History

You can now indicate if you want to merge employment history information when you merge constituents. You make this selection when you configure constituent merge settings.

From *Constituents*, click **Duplicates** under **Maintenance**. On the Duplicates page, click **Constituent merge** under **Merge constituents processing**. On the Merge Configurations tab, click **Add**. When you select Relationships, you see the new **Merge employment information** checkbox.

**Add constituent merge configuration**

Name:

Description:

**Merge tasks**

- ☒ Name formats
- ☒ Naming opportunity recognition
- ☒ Personal / organization information
- ☒ Phone numbers
- ☒ Recognition defaults
- ☒ Recognition programs
- ☒ Relationships
- ☒ Revenue
- ☒ Sales order
- ☒ Security groups
- ☒ Sites
- ☒ Solicit codes
- ☒ Sponsorship
- ☒ Staff records
- ☒ Stewardship plans

**Relationships merge task**  
This merge task merges the relationships associated with two constituents.

**Task options**

In case of duplicates, keep:

**Individuals**

Primary business relationship criteria:

Spouse relationship criteria:

**Organizations**

Parent organization relationship criteria:

**Employment History**

☒ Merge employment information

Help Save Cancel

When this checkbox is selected, if there is conflicting employment information for the constituents to be merged, the merge includes all employment history in the target record, unless there are overlapping dates. Overlapping dates will cause an error when this checkbox is selected. When the checkbox is not checked, the merge does not copy any employment information for identical relationships in the records to be merged.

When you upgrade, existing constituent merge configurations now have this option and it is selected by default to merge employment information. New constituent merge configurations will also have this option selected by default.

## Data Warehouse

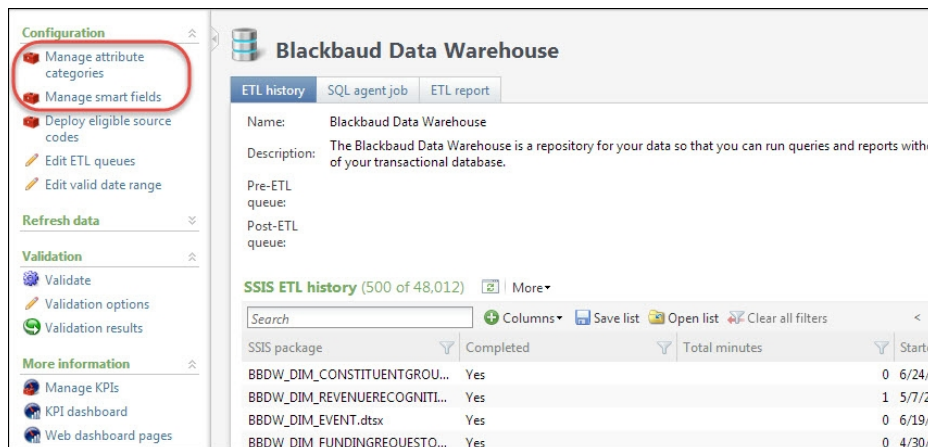
### Blackbaud Data Warehouse

The data mart has been re-named to Blackbaud Data Warehouse. There are no functionality changes as a result of this new name, but all screens now reflect this change.

To access the Blackbaud Data Warehouse, from *Administration*, click **Data warehouse**.

## Manage Attribute Categories and Smart Fields

You now manage attribute categories and smart fields directly from the data warehouse. Previously, you clicked **Select eligible attribute categories** or **Select eligible smart fields** on the Blackbaud Data Warehouse page under Configuration and you selected your preferences in a form. These options have been renamed to **Manage attribute categories** and **Manage smart fields**.



Once you select one of these options, on the Attribute Categories page or the Smart Fields page, you expand an item and click **Include in warehouse** or **Remove from warehouse** to manage whether they are included in the warehouse.

## Direct Marketing

### New Direct Marketing Effort Workflow

This release includes phase 1 of our improvements to the marketing and communications workflow. Our goal is to make the marketing effort process consistent and coordinated across all fundraising programs and channels, and able to scale for complexity. You will be able to track marketing data consistently and access compiled statistics for a constituent across all types of communications. You will also be able to create all types of communications using a common process which means fewer tools to learn and maintain within an organization.

Version 4.0 introduces communication templates to standardize and streamline the setup process for marketing efforts. Templates define default settings and simplify setup by including only the options you need to create a communication. For this release, templates are available for only direct marketing efforts. All other marketing efforts and communications, including marketing acknowledgements, membership renewals, appeal mailings, remain unchanged for now.

This is the new direct marketing workflow:

- System administrators configure communication templates and name patterns.
- Campaign analysts build marketing efforts based on templates. They add segments to the marketing effort and configure any settings not defined and locked by the template.
- Campaign analysts execute the marketing effort and monitor its status.

## How Do We Prepare?

After your organization upgrades to 4.0, a system administrator needs to configure communication templates for users who execute marketing efforts. Setup and implementation of communication templates requires coordination among multiple roles at your organization. For example, this is one possible structure:

Business Analyst/Systems Analyst:

- Works with the marketing manager and campaign analyst to gather requirements for the types of direct marketing efforts you plan to create.
- Configures templates based on requirements.

Marketing Manager:

- Provides subject matter expertise for template configuration.
- Drives decisions around which defaults to use based on the fundraising program's requirements. For example, you can set default exclusions and export formats on a template. You must decide which values to use as defaults and whether to lock these settings or allow the campaign analyst to change them on the marketing effort.

Campaign Analyst:

- Provides subject matter expertise for template configuration.
- Runs test marketing efforts to validate template setup.

Blackbaud Professional Services:

- Provides product expertise.
- Guides best practice of configuration with the business analyst.

The program includes 3 example templates for direct marketing efforts. Your organization should review these templates to evaluate how well they meet your needs. You can modify the examples or create new templates.

## Communication Templates

Communication templates define default settings for direct marketing efforts and simplify the setup process by including only the options you need to create the effort. With communication templates, you can create direct marketing efforts that are as simple or complex as your organization needs. You can choose which features to make available for a direct marketing effort. For example, if your organization does not track KPIs, you can leave the KPIs grid blank and lock it so the KPIs tab is completely hidden for users who create marketing efforts based on that template.

The program provides 3 template examples you can evaluate and modify to meet your organization's needs. The program also includes an example name pattern used by the simple email and mail templates.

- **Example Complex Mail Template:** This is an example for sophisticated direct mail marketing efforts. All features are turned on and unlocked.
- **Example Simple Email Template:** This is an example for simple email communications. Features not typically used with email efforts are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.
- **Example Simple Mail Template:** This is an example for simple mail communications. Features not typically used with simple mailings are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.

To access communication templates, from the Marketing and Communications page, click **Communication templates** under **Configuration**. The Communication Templates page appears.

Click **Add**. The Add communication template screen appears. On this screen is a series of forms that walk you through the communication template setup process.

**Add communication template**

Start setup   Select features and defaults   Confirm and make active

**Welcome to the communication template setup process.**  
Use communication templates to define the types of communication efforts users can build. Templates determine the setup process for communication efforts and which features are available.

**First, define the basic properties of the template:**

**Communication template properties**

Name:

Description:

Site:

**Optional template features**

Customize the features available for this template and the communication efforts that use it.

Include options to: ☐ Override segment ask ladders  
☐ Override appeal business units in the effort and/or in segments  
☐ Include seeds in communication

Help   Previous   Next   Save   Cancel

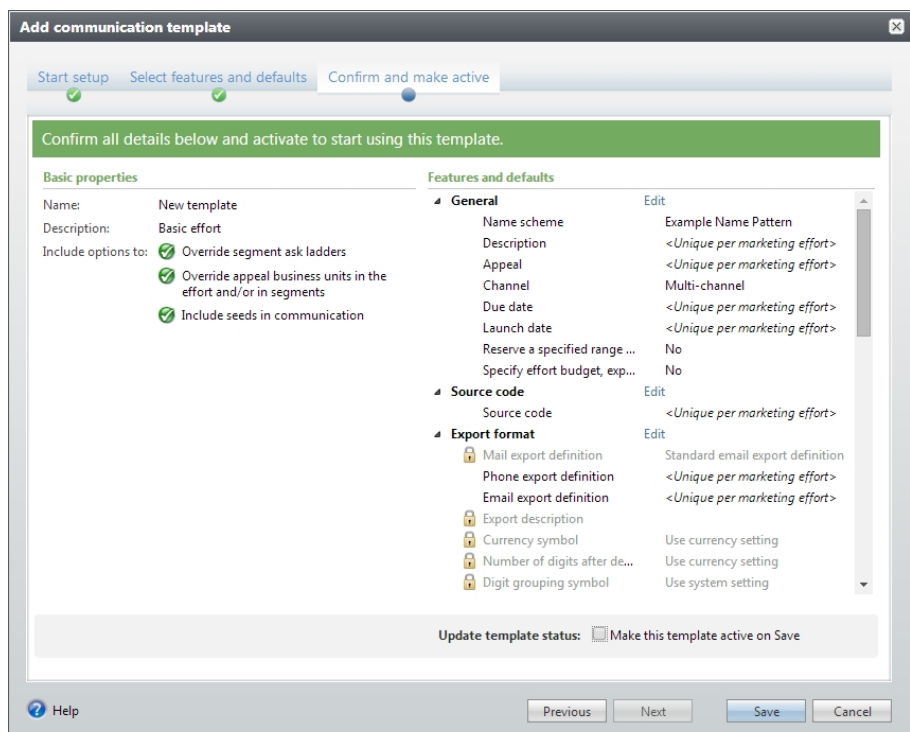
On the Select features and defaults form, you can configure features and settings for the marketing efforts that use this communication template. This form is divided into a series of tabs you can navigate between to set up various parts of the template.

On each tab, you can enter default values for fields on marketing efforts created from the template. For example, you can enter a default source code. You can also choose which fields are editable by users who create marketing efforts from the template. If a field is unlocked, users can edit its value on the marketing effort. If a field is locked, the field is hidden on the marketing effort and the value selected on

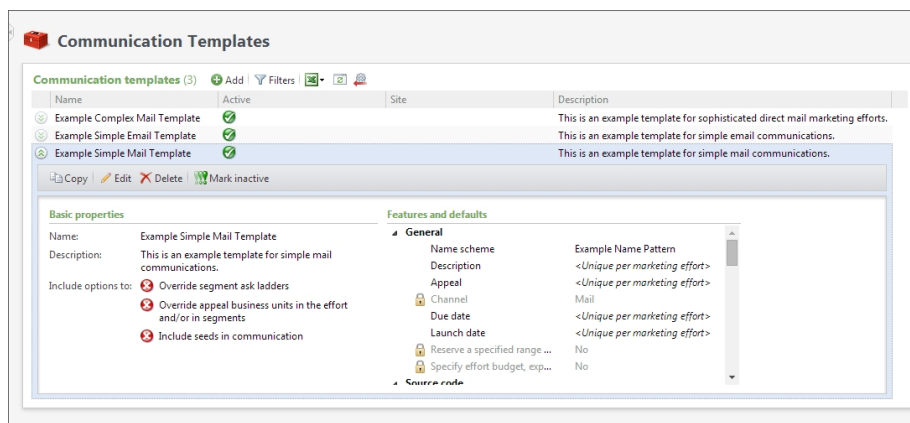
the template is always used. If you lock all fields and options on a tab, that tab will not appear at all on marketing efforts.

The screenshot shows a software window titled "Add communication template" with a close button (X) in the top right corner. At the top, there are three tabs: "Start setup" (with a yellow exclamation mark icon), "Select features and defaults" (with a blue circle icon), and "Confirm and make active" (with a white circle icon). Below the tabs is a green banner with the text: "Next, configure the setup process for communication efforts that use this template:". On the left side, there is a vertical list of tabs: "General" (selected), "Source code", "Export format", "Activation", "Address processing", "KPIs", "Universe", and "Exclusions". The main content area is divided into two sections. The first section, "General information", contains the following fields: "Name pattern:" (text input with a magnifying glass icon), "Description:" (text input with placeholder text "Enter default description" and a lock icon), "Appeal:" (dropdown menu with placeholder text "Select default appeal" and a lock icon), "Channel:" (dropdown menu with "Multi-channel" selected and a lock icon), "Due date:" (text input with placeholder text "<Unique per marketing effort>"), and "Launch date:" (text input with placeholder text "<Unique per marketing effort>"). The second section, "Additional options", contains the text "For this marketing effort, include options to:" followed by two checkboxes: "Reserve a specified range of finder numbers" and "Specify effort budget, expenses, and goals", each with a lock icon. At the bottom left is a "Help" button with a question mark icon. At the bottom right are four buttons: "Previous", "Next", "Save" (highlighted in blue), and "Cancel".

On the Confirm and make active form, you can review the settings defined for the communication template and make changes before you make it available for use.



On the Communication Templates page, you can expand a saved communication template to quickly preview its settings.



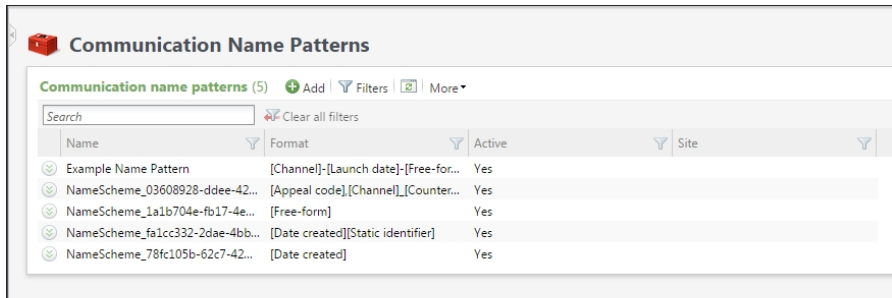
## Communication Name Patterns

Communication name patterns allow you to generate unique but consistent names for all direct marketing efforts created from a communication template. When you configure name patterns, you select parts that build the effort's name. Some parts are dynamic and populate automatically when a user creates an effort. For example, if you include the Appeal code or Channel part, those values pull from the appeal or channel assigned to the communication template. Values for Static identifier and Counter parts populate automatically when a user creates a new effort. If you include a Free-form part, the user who creates the marketing effort must enter a text value for that part of the name.



**Tip:** Configure name patterns before communication templates.

To access the Communication Name Patterns page, from the Marketing and Communications page, click **Communication name patterns** under **Configuration**. The **Communication name patterns** grid displays the name patterns saved in your database. From this grid, you can edit existing name patterns or add new ones.



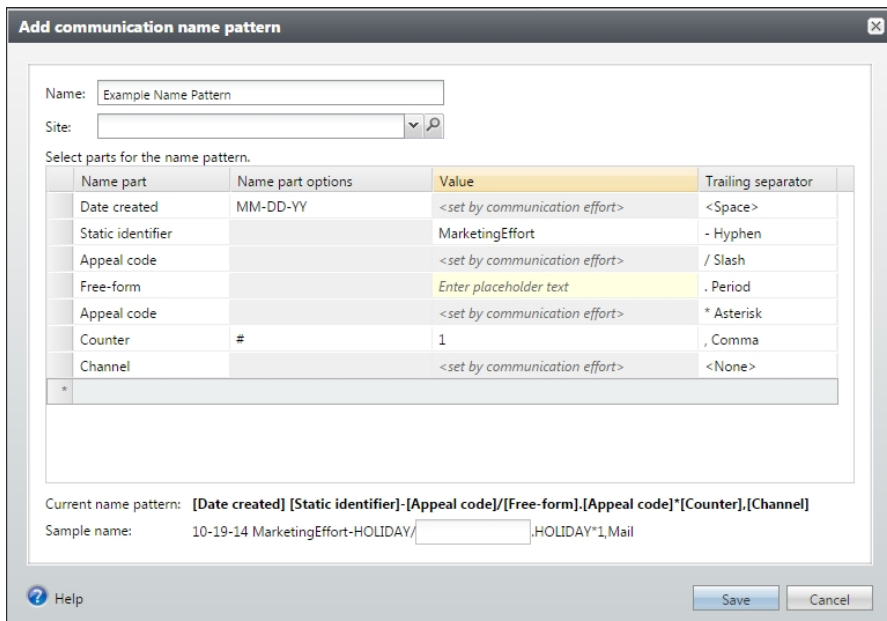
**Communication Name Patterns**

Communication name patterns (5) [Add](#) [Filters](#) [More](#)

Search [Clear all filters](#)

Name	Format	Active	Site
Example Name Pattern	[Channel]-[Launch date]-[Free-for...	Yes	
NameScheme_03608928-ddee-42...	[Appeal code].[Channel].[Counter...	Yes	
NameScheme_1a1b704e-fb17-4e...	[Free-form]	Yes	
NameScheme_fa1cc332-2dae-4bb...	[Date created][Static identifier]	Yes	
NameScheme_78fc105b-62c7-42...	[Date created]	Yes	

To create a new name pattern, click **Add**. On the Add communication name pattern screen, select parts for the name.



**Add communication name pattern**

Name:

Site:

Select parts for the name pattern.

Name part	Name part options	Value	Trailing separator
Date created	MM-DD-YY	<set by communication effort>	<Space>
Static identifier		MarketingEffort	- Hyphen
Appeal code		<set by communication effort>	/ Slash
Free-form		Enter placeholder text	. Period
Appeal code		<set by communication effort>	* Asterisk
Counter	#	1	, Comma
Channel		<set by communication effort>	<None>

Current name pattern: **[Date created] [Static identifier]-[Appeal code]/[Free-form].[Appeal code]\*[Counter].[Channel]**

Sample name: 10-19-14 MarketingEffort-HOLIDAY/.HOLIDAY\*1,Mail

[Help](#) [Save](#) [Cancel](#)

When you configure a communication template, you can select a name pattern to apply to all marketing efforts created from that template.

**Add communication template**

Start setup | Select features and defaults | Confirm and make active

Next, configure the setup process for communication efforts that use this template:

**General**

Source code

Export format

Activation

Address processing

KPIs

Universe

Exclusions

**General information**

Name pattern:

Description:

Appeal:

Channel:

Due date:

On the direct marketing effort, complete any parts missing from the name pattern.

**Add marketing effort**

Select template | Create effort

**General information**

Template:

Name:

Description:

Appeal:

Site:

Due date:

Launch date:

## Copy Segments From Another Marketing Effort

Segments that perform well are often used for multiple marketing efforts over time. To reuse segments in earlier versions, the only option was to copy an existing marketing effort. Now that direct marketing efforts are created from templates, we added the ability to copy segments from an existing marketing effort to a new marketing effort. This is helpful when you want to reuse segments with a marketing effort that uses different settings than the original.

From Segments tab of an unactivated direct marketing, membership renewal, or sponsorship effort, click **Copy from another effort**. Select the marketing effort with segments you want to copy. The copied segments appear on the Segments tab below any segments already added.

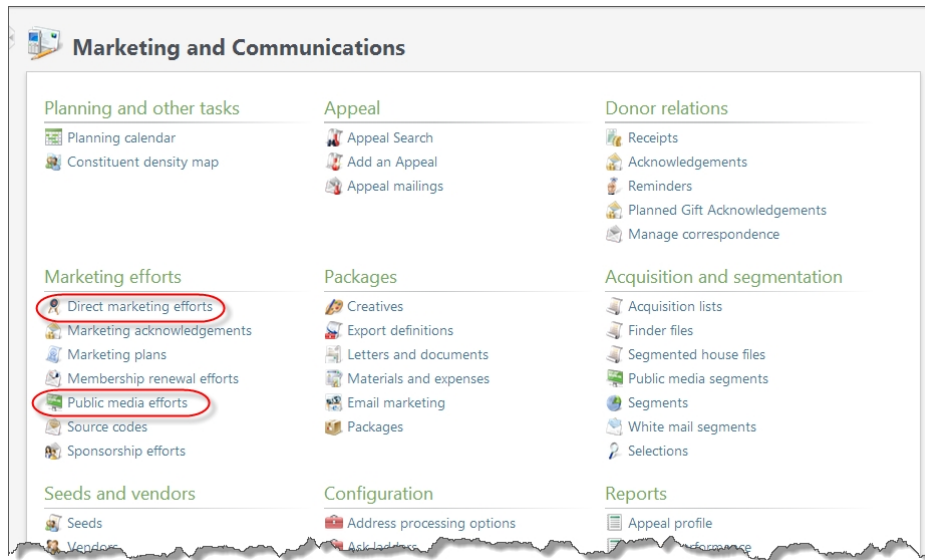
Notes about copying segments:

- The copy process includes all segments from the selected effort, including test segments.
- You can only copy segments with the same base currency.
- You can only copy segments from marketing efforts of the same type. (i.e., you cannot copy segments from a direct marketing effort to a membership renewal.)

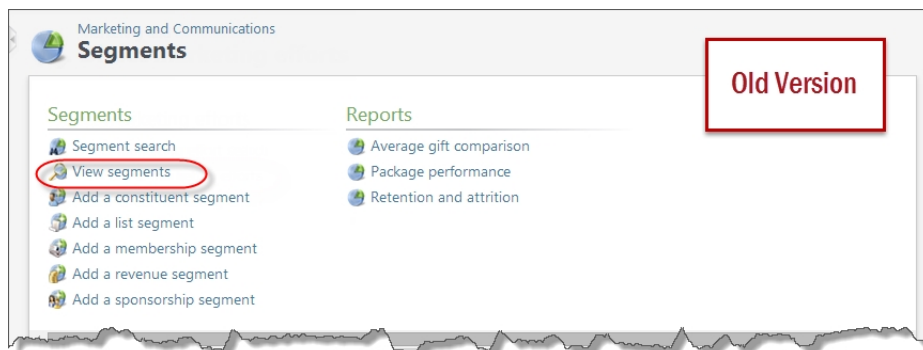
- You cannot copy segment/package combinations that already exist on the marketing effort you are copying to. You receive a message that allows you to copy all other segments or cancel.

## Changes to Navigation in Marketing and Communications

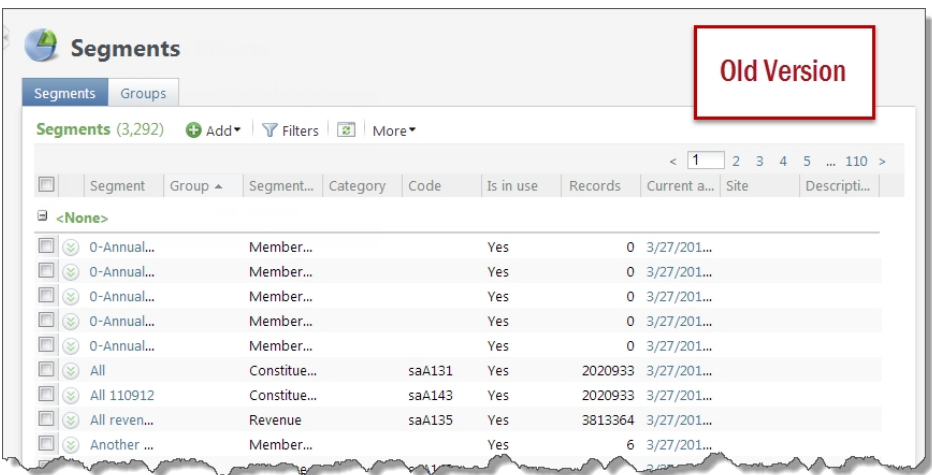
You now manage public media and direct marketing efforts in separate areas. Links appear for both features on the Marketing and Communications page.



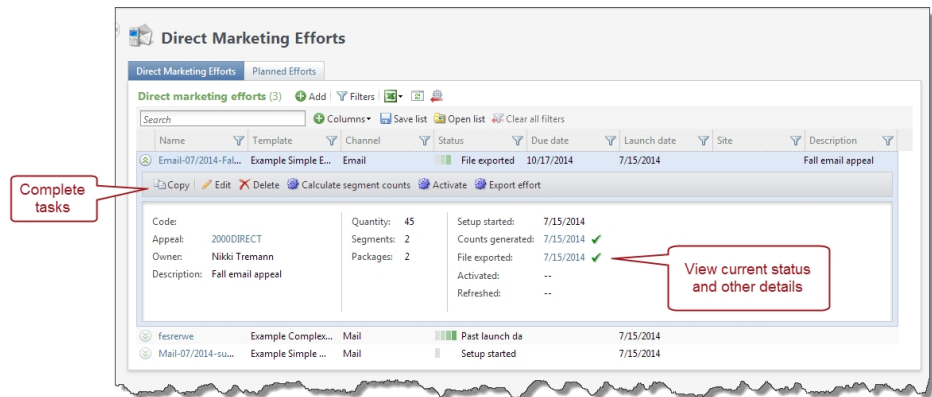
We improved the data lists for marketing efforts, export definitions, and segments. In previous versions, when you opened these features from the Marketing and Communications page, you accessed a page similar to this one.



From this page, you clicked **View [record type]** to open the list of records.



Now, when you click the feature links for marketing efforts, export definitions, or segments, you immediately open a page with the list of records. These pages use the new list builder format that makes it easier to quickly view information about records in the list and to complete related tasks.



For example, from a marketing effort's page, when you expand a marketing effort in the list, a drop-down profile displays information such as the associated appeal, owner, and number of segments and packages. You can quickly monitor the progress of marketing effort setup tasks. The profile displays the **Setup started** date for the marketing effort and the current status and date for the segment counts calculation, file export, activation, and refresh processes. To view the status page for a process, click the date next to the process name. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

Task buttons appear for processes you still need to run. For example, if the effort is activated, the **Edit activation criteria**, **Export effort**, and **Refresh effort** buttons appear.

You can also customize the list of marketing efforts. You can add and remove columns and choose how they filter and sort. For example, for the **Status** column, you can set the filters to display only activated marketing efforts. You can also save list parameters to quickly display different views of the list. For example, you may want activated marketing efforts to display fewer columns or in a different order. To save list parameters, click **Save list**. You can also search the list by keyword.

For more information about customizing lists, see [Enhancements to Lists on page 40](#).

## Changes to Marketing Effort Records

We made enhancements to all types of marketing effort records to provide more information about the effort and its current status. This is an example of a marketing effort record in previous versions.

Marketing Efforts  
**Copy of RD**

Quantity: -- Segments: 1 Effort ID: 151 Site: --  
 Budget: \$50.00 Packages: 3 Code: maA019 Status: Not activated Description: --  
 Total expenses: -- Seeds: 0 Date: --  
 Expected revenue: -- Test efforts: 0 Appeal: Ravi

Segments (3)

Name	Source code	Package	Channel	Ask ladder	Records	Sample size	Quantity
Hawes	maA019saA130paA333	RH regression	Mail		--	50%	
Test1	maA019saA130paA011	LT_AM_PACKAGE_5	Mail			50%	
Record calculation	maA019saA130paA339	1	Mail			1	

This is an example of the new marketing effort record.

Marketing Efforts  
**2000DIRECTMail06-05-14 (1)**

Overview

Template: New Mail Template  
 Effort ID: 43 Owner: Brad Woods  
 Appeal: 2000DIRECT Budget: \$0.00  
 Due date: Expected revenue: \$0.00  
 Launch date: 6/5/2014 Total expenses: \$220.95  
 Description:

Status

Status: Activated  
 Segments: 2  
 Packages: 2  
 Total quantity: 3,042

History

Setup started: 6/5/2014  
 Counts generated: 6/6/2014 ✓  
 File exported: --  
 Activated: 6/6/2014 ✓  
 Refreshed: --

Source Code

Source code: Brad

Source code part	Format	Value
Marketing Effort	3 Digit Number	002
Channel	<by package>	
Package	<by package>	
Segment	<by segment>	

The profile information at top is better organized and provides more details. The **Status** section displays the current state of the effort, the total number of segments and packages, and the total quantity of

records in the marketing effort, broken out by segments and seeds. The **Status** field includes these states:

- Setup started – The effort is started but segment counts are not yet calculated.
- Counts generated – Segment counts were calculated.
- File exported – The effort was exported before activation.
- Activated – The effort was activated and the current date is before the effort's launch date.
- Past launch date – The effort was activated and the current date is later than the effort's launch date.

The **History** section displays the date setup started and the current status for the segment counts calculation, file export, activation, and refresh processes and whether those processes completed successfully. To view the status page for a process, click the date next to the process name.

Tabs on marketing effort records are unchanged with a few exceptions. Direct marketing efforts now respect the settings defined on communication templates. The tabs and options you can view and edit depend on what is locked on the selected template. For more information about direct marketing efforts records, see [Direct Marketing Efforts on page 1](#).

The Segments tab for direct marketing, membership renewal, or sponsorship efforts now includes a **Copy from another effort** button which allows you to copy segments from other efforts. For more information, see [Copy Segments From Another Marketing Effort on page 34](#).

All marketing effort records include two new tabs:

- The Effort Settings tab includes additional tabs that display information defined on the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template. These tabs include the Source Code, Export, Activation, Address processing, KPIs, Finder Numbers, Budget/Expenses, Ask Ladder Overrides, and Seeds tabs.
- The Basic Information tab includes general information, such as the name, appeal, and channel, defined on the direct market communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

## Enhancements to Marketing Business Processes

We made changes to marketing business processes to make it easier for multiple users to complete marketing tasks at the same time.

- The program now allows you to run multiple segmented house file import processes for marketing efforts at the same time.

**Note:** The process fails if you attempt to run more than one segmented house file import for the same marketing effort at the same time.

- Because the refresh process for white mail segments refreshes all white mail segments in the database, the program now allows you to run only one white mail refresh at a time.

**Note:** The refresh fails if you attempt to start the process while it is already running.

## Events

### Partially Pay for Events with Designations

You can allow registration fees for an event to apply to a designation. The amount that applies to a designation is equal to the receipt amount, which does not include the cost of any benefits from an event. Previously, for events with designations, registrants had to pay the event registration in full. To make things more consistent with other types of payments, we now allow for registrants to partially pay the registrations. If you partially pay for an event registration, the revenue is applied to the cost and benefits of the event until that portion is fully paid. Only after that happens is any event registration revenue applied to the designations.

## General Features

### File Uploads

In previous versions, when you attempted to upload a large file from your local machine, you received an error or the program timed out. To fix this issue, the program now breaks the file into small "chunks" (1 MB by default) and uploads each chunk separately to the web server. To change the chunk size, edit the "FileUploadChunkSize" application setting in your web.config file. For more information about how to edit the web.config file, see the *Infinity Installation and Upgrade Guide*.

The new file upload functionality also includes a progress bar with a **Cancel** button. These enhancements apply to all features that allow you to upload files from your local computer.

### Supported Browsers

- *Chrome* best supports the new upload functionality. It performs asynchronous uploads which means it can upload multiple chunks of the file at once. This is usually the fastest method, depending on server and network capabilities. Internal browser limitations restrict the number of simultaneous uploads the browser tries to do at once.
- *Firefox* or *Internet Explorer* version 10 or higher are the next best options. They perform synchronous uploads which means they can only upload one chunk at a time. This may result in slower upload times than *Chrome* can provide.

**Note:** For Mac users, *Safari* 6 fully supports the new upload functionality with asynchronous uploads. Earlier versions of *Safari* upload large files as one chunk so you may encounter errors.

### Unsupported Browsers

- *Internet Explorer* through version 9 does not support the new upload functionality. In older versions of *Internet Explorer*, the program uploads large files as one chunk so you may encounter errors. They

do not provide the progress bar with a **Cancel** button.

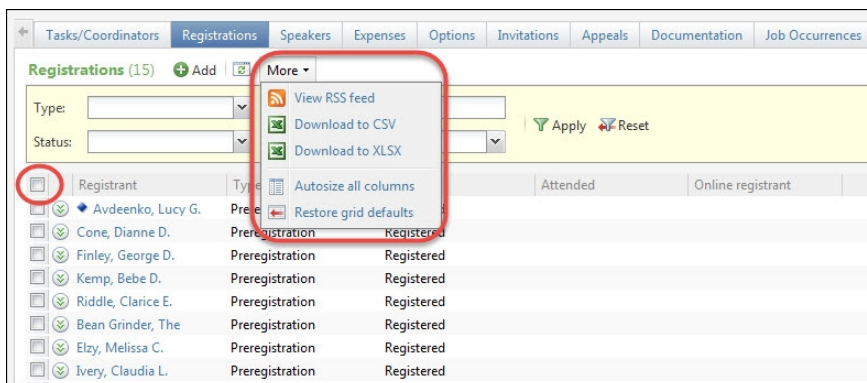
## Enhancements to Lists

We added features to both data lists and to list builder lists. As a reminder, data lists are currently the most common type of list in the program, and they do not include advanced features such as column selection and filtering by column. We continue to convert data lists to the list builder format.

### Data Lists

For data lists that use the existing format, we have added the following features.

- You can now select to size all columns on a data list according to the width of the content in the columns. From the **More** menu, select **Autosize all columns**. This option automatically resizes all columns in the data list so all data displays completely.
- You can now right-click column headers to access menu options, including sort options for the column.
- When you scroll down a list, multi-row actions are now available at the top of the browser window. This allows you to use multi-row actions without having to scroll back to the beginning of the list.

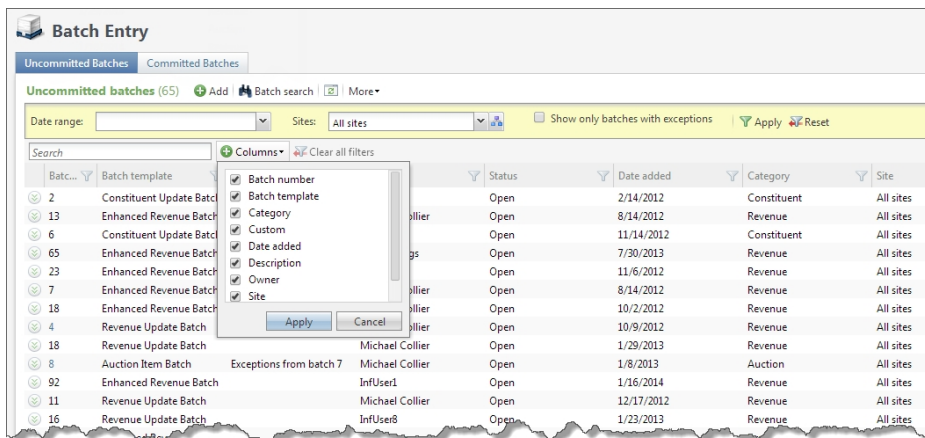


### List Builder

**Show Me:** [Watch this video to learn more about list features.](#)

Several data lists were upgraded to a new format that allows you to customize how data appears in a list. List options may vary based on the nature of the list.





You can add and remove columns and choose how they filter and sort. To change the order of the columns, click on a column header and drag it into a new position. For example, in *Batch Entry*, you can set filters on the **Owner** column so the list displays only batches you own. When you add columns, you may need to scroll across the list in order to view them.

You can also save list parameters to quickly display different views of the list. For example, you may want fewer columns displayed for constituent batches or in a different order. To save list parameters, click **Save list**. Additionally, you can use search to quickly locate items in the list. If you cannot find the information when you search or filter, your search and filter parameters might be too restrictive. However, you can clear the search and filters to expand the parameters.

You can also complete tasks for records in the list. To access task buttons, click the double arrows next to a record to expand the row. Expanded rows may also include additional information about the record.

## Exports to Excel

When you export a data list or query to *Microsoft Excel*, the date, currency, and numeric columns are now automatically exported with the correct data type. Previously, these columns were exported as text. If you wanted to sort or filter those columns, you had to first reformat them to the appropriate data type.

To export a data list to *Excel*, click **More** and select "Download to XLSX." To export query results to *Excel*, from the query, click **Export** and select "Download to XLSX."

## Rearrange Tabs

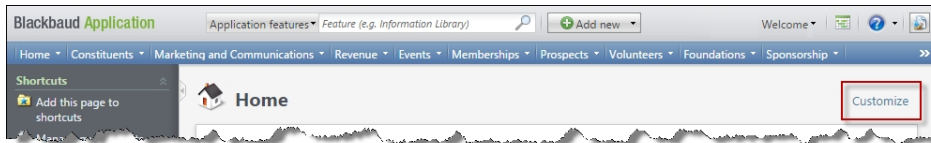
Individual users can now drag and drop tabs and subtabs into any order they prefer. This is a sticky setting, so it is saved the next time you access any record of the same type. This allows you to organize the tabs in the order that makes sense for your workflow. Any record that uses tabs, such as Constituents, Revenue, Events, and so on, can use this feature.

**Note:** There is no way to reset the tabs to their default setting once they have been moved. They must be moved manually in order to reset them to the default.

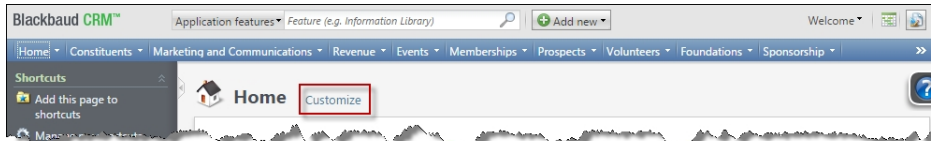
## Customize Home Page

On the Home page, to accommodate the new Help Panel, we moved the **Customize** link. This new placement only appears when the Help Panel is selected as the help type.

Previously, the **Customize** link appeared in the top right corner of your browser.



With this release, the **Customize** link now appears next to **Home**.



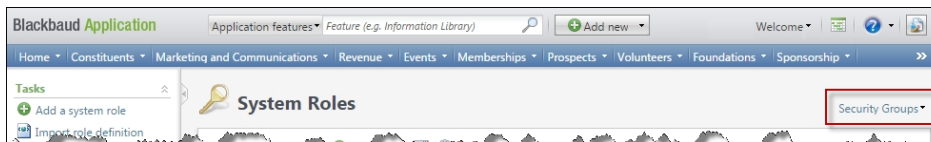
For more information about the new Help Panel, see [Online Help Panel on page 7](#).

For more information about configuring the Help type, see [Configure Help Type on page 8](#).

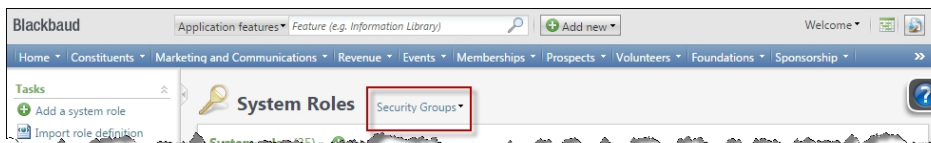
## Navigation Tree

To accommodate the new Help Panel, navigation trees have moved. This new placement only appears when the Help Panel is selected as the help type.

Previously, navigation tree links appeared in the top right corner of your browser.



With this release, navigation tree links now appear next to the page name.



For more information about the new Help Panel, see [Online Help Panel on page 7](#).

For more information about configuring the Help type, see [Configure Help Type on page 8](#).

# General Ledger Setup

## Post Membership Installment Plans

You now have the ability to map membership installment plans to the ledger in order to generate ledger transactions. When you configure your membership programs, you can select whether to have the installment plans or just the installment payments be posted to the ledger. For annual, dues-based or dues- and contributions-based programs, the option appears on the Dues tab. For lifetime programs, the option appears on the Payment Options/Levels tab.

When you upgrade, existing membership programs that use installment plans are set to "Do not post." If you change this setting on the membership program, any memberships added after the upgrade that use installment plans will reflect the new post status. Existing memberships for those programs that have installment plans will be set to "Do not post."

**Note:** In order to take advantage of this functionality when you upgrade, you will need to set up your General Ledger account mappings for membership installment plans and for membership installment plan payments. You have the option to map the contributed portion of memberships differently than the earned portion. You can also map revenue from add-ons associated with the membership. In addition, you can map write-offs for the membership installment plans. The membership installment plan accounts are mapped on the Membership Installments tab in **General ledger setup** in *Administration*. The membership installment plan payments are mapped on the Payments tab in **General ledger setup**.

## Import

## Batch and Import Guide Enhancements

With this release, we made a significant investment in improving the quality of our existing User Education resources. One such area of improvement focused on the [Batch and Import Guide](#) and associated help file content.

The following list highlights several of our enhancements:

- We tested and updated content to ensure accuracy and provide a more logical flow of information.
- We created new How-To videos to visually enhance your understanding of *Batch* and *Import*.

**Show Me:** [Watch this video for a high-level overview of Batch](#)

**Show Me:** [Watch this video for a high-level overview of Import](#)

**Show Me:** [Watch this video to learn how to apply payments to commitments in Batch](#)

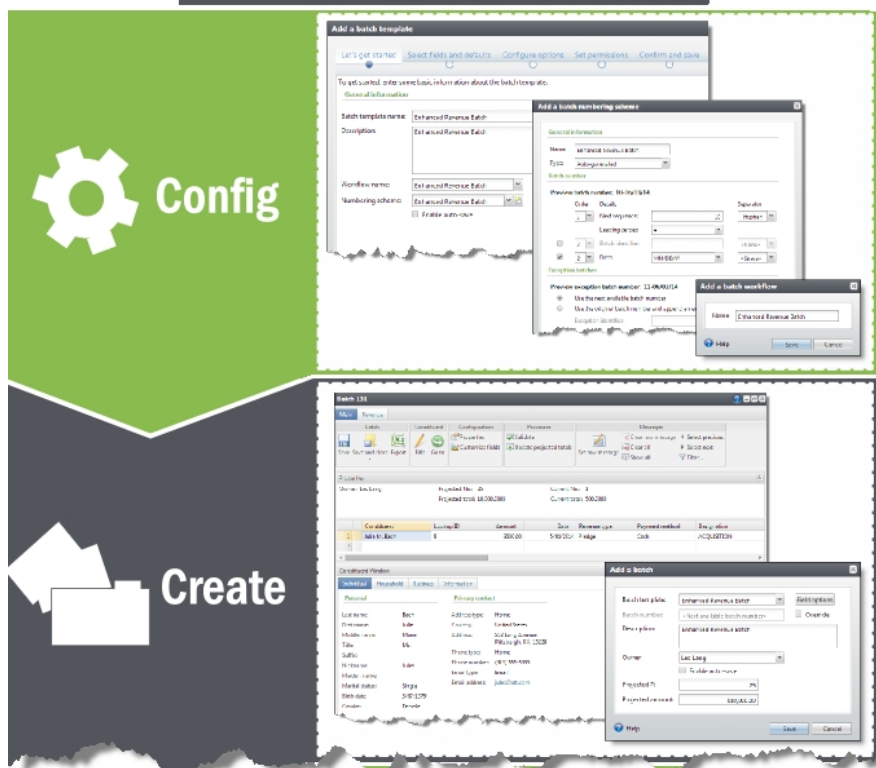
- We added a new "Big Picture" chapter that offers an overview of *Batch* and *Import*, and describes how they work together to save time and promote consistent data management.

# Batch and Import: The Big Picture

Full Circle View .....	1
Life of a Batch .....	2
Life of an Import Process .....	5
Tips and Considerations .....	7

This chapter also illustrates the life cycle of a batch and import process, and provides tips and considerations to enhance your workflow.

## Workflow - Life of a Batch



- To help you more clearly understand the validation process, we added more detail to our list of validation errors and the reasons for their occurrence.

## Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

### Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see *Customize the Fields in a Batch* on page 70.

### Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

### Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see *Resolve Duplicate Constituents in a Batch* on page 118.

### Account or account segment errors

Ensure the GL mapping is up-to-date or the segment is defined. For more information, see the *GL Setup Guide*.

# Memberships

## Search for Members

We have made enhancements to the Member Search and the Membership Dues Constituent Search screens.

To help save time with these searches, all checkboxes on the search forms, such as the ones to include inactive or deceased constituents, carry over to the next time you use the search screen. For example, you can search for a member with the last name "Smith" and choose to include individuals, but not organizations. The next time you perform a search, the last name criteria is removed but the individual checkbox remains selected. To access the Member Search screen, click **Member search** under **Tasks** on the *Memberships* page.

In addition, the Membership Dues Constituent Search screen also contains some advanced search criteria, such as the ability to search by alternate lookup IDs.

To access the Membership Dues Constituent Search screen, search for a constituent from the Add a membership screen or from a Membership Dues Batch.

## Membership Installment Plans

For membership programs which allow installment plans, you can add memberships and have the option to pay in full, pay the first installment, or create the installment plan without making a payment. Previously, when you added a membership and selected **Create installment plan**, the "How are they paying" section was disabled.

**Note:** Now in this section you can select a payment method of credit card or direct debit and enter the card number, but the transaction amount is still zero. This helps save you time when you have a card number but do not want to charge it yet.

**Add a membership**

Jean H. Aertker

**How are they paying?**

Payment method: Credit card

Name on card:

Card type:

Card number:

Expires on:

Reference:

☐ Mark this membership for automatic renewal for later query

**Are there any special instructions?**

☐ Do not acknowledge

☐ Is anonymous

Letter:

☐ Do not receipt

Tax deductible amount:

Total amount:

Help Save Cancel

## Post Membership Installment Plans

You now have the ability to map membership installment plans to the ledger in order to generate ledger transactions. When you configure your membership programs, you can select whether to have the installment plans or just the installment payments be posted to the ledger. For annual, dues-based or dues- and contributions-based programs, the option appears on the Dues tab. For lifetime programs, the option appears on the Payment Options/Levels tab.

When you upgrade, existing membership programs that use installment plans are set to "Do not post." If you change this setting on the membership program, any memberships added after the upgrade that use installment plans will reflect the new post status. Existing memberships for those programs that have installment plans will be set to "Do not post."

**Note:** In order to take advantage of this functionality when you upgrade, you will need to set up your General Ledger account mappings for membership installment plans and for membership installment plan payments. You have the option to map the contributed portion of memberships differently than the earned portion. You can also map revenue from add-ons associated with the membership. In addition, you can map write-offs for the membership installment plans. The membership installment plan accounts are mapped on the Membership Installments tab in **General ledger setup** in *Administration*. The membership installment plan payments are mapped on the Payments tab in **General ledger setup**.

## Partially Pay for a Membership Installment

You now have the ability to partially pay for a membership installment. Previously, when adding a membership installment payment, you could pay the next installment amount and select a **Pay**



**additional money toward next installment** checkbox to enter an additional amount. We have removed the checkbox and instead created a **Pay other amount** option and field. When you select **Pay other amount**, you enter the amount of the payment.

**Add a membership**

Mark D. Adamson

**What are they paying for?**

Mark D. Adamson's memberships: Pay for the Alumni Association - Fam Pay next installment by 10/15/2014  
Current balance: \$120.00

Program: Alumni Association Benefits: None Edit

Level: Family

Term: 1 year(s)

Expires on: 10/15/2015

Type:

☐ Pay in full \$120.00

☒ Pay next installment \$30.00

☐ Pay other amount Additional money worth more than the current installment will be applied to future installments.

**Are they also giving a donation?**

☐ Do not receipt Tax deductible amount: \$30.00 Total amount: \$30.00

Help Save Cancel

- If the amount is less than the next installment amount, the next installment is partially paid.
- If the amount is greater than the next installment, but less than the balance remaining for the installment plan, the amount is applied to the remaining installments, in order. If you want any additional amount to count as a donation instead of a payment toward the next installment amount, you can still use the "Are they also giving a donation" fields on the screen.
- If the amount is greater than the balance remaining for the installment plan, the installment plan is fully paid and the user is prompted for the remaining amount to become an additional donation.

When you upgrade, any Membership Dues Batch templates, as well as any uncommitted Membership Dues Batches, which include the **Pay additional money toward next installment** and **Additional amount** fields will be updated to include the new **Pay other amount** field. The **Pay additional money toward next installment** and **Additional amount** fields are not removed from the batches or templates because recurring memberships still use them. For applicable membership transactions in the batches when you upgrade, the **Pay other amount** field is automatically populated with the sum of the next installment amount plus the amount that was in the **Additional amount** field.

## Membership Gift Status

You can now make a membership a gift. To do this, on a membership record, click Other tasks, Make membership a gift. You can also do this from the Membership tab of a constituent record. After you make a membership a gift, you can edit the renewal information.

Previously, you could only remove gift status from the constituent membership record. Now you can also remove it from the constituent record.



## Membership Dues Revenue Report

We added grand totals to the Membership Dues Revenue report and subtotals for each reporting group. These totals make it easier to quickly report on the total amount collected for membership programs and evaluate how well individual programs are selling.

**Membership Dues Revenue**

Membership program:  Date:

Group by:  From:  To:

1 of 1 Find | Next

Reporting group	Membership level	Channel	Revenue	Add-on revenue	Memberships	Additional gifts
(no reporting group)			<b>\$3,558.00</b>	<b>\$30.00</b>	<b>41</b>	<b>\$502,048.00</b>
	Student		\$377.00	\$0.00	13	\$97.00
		(no channel)	\$377.00	\$0.00		
	Individual		\$1,636.00	\$30.00	14	\$501,297.00
		(no channel)	\$1,636.00	\$30.00		
	Family		\$1,545.00	\$0.00	14	\$654.00
		(no channel)	\$1,545.00	\$0.00		
	<b>Grand totals:</b>		<b>\$3,558.00</b>	<b>\$30.00</b>	<b>41</b>	<b>\$502,048.00</b>

## Prospects

### Search External Prospecting Database Updates

From *Prospects*, when you search the Target Analytics prospecting database for new prospects or for more wealth information on existing constituents, we've made improvements to the search process and added three new data sources.

### Added Tiles to the Search Results Grid

As a researcher, you need to quickly search and consume new assets located during a prospect search, to identify new prospects and groups of prospects. The new tile structure we added to the results grid helps you in this effort.

The new tiles display details about the prospect's wealth. To make sure you're viewing all tiles for which information was located, click Show more.

**Search**

Find new prospects:

[Show advanced search](#)

Prospect not found? [Add a new prospect and screen now](#)

1 result(s) displayed for "Arthur Blank" in "Atlanta, GA"

**Prospecting Database results**

Sort by: Full name

**ARTHUR M BLANK (Age 71)** [Show more](#) [Screen now](#)

Biographical	HH Members	Demographic Models
DOB: 1/1943 Marital status unknown Occupation unknown	STEPHANIE V BLANK DOB: 1971 (Age 43) Marital status unknown Occupation unknown	Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262

Links included in the tiles take you to screens providing additional information.

Prospect not found? [Add a new prospect and screen now](#)

1 result(s) displayed for "Arthur Blank" in "Atlanta, GA"

**Prospecting Database results**

Sort by: Full name

**ARTHUR M BLANK (Age 71)** [Show less](#) [Screen now](#)

Biographical	HH Members	Demographic Models
DOB: 1/1943 Marital status unknown Occupation unknown	STEPHANIE V BLANK DOB: 1971 (Age 43) Marital status unknown Occupation unknown	Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262

Giving	Securities (1 of 3)	Businesses (1 of 5)
Largest gift: \$1,000,000 EDUCATION \$4,325,000 HOSPITAL, HEALTH CENTER \$2,401,000 INTERNATIONAL, FOREIGN AFFAIRS, \$2,200,000	HOME DEPOT INC Chairman of the Board Total value: \$3,167,188,790 Direct value: \$2,999,535,776 Indirect value: \$167,653,014	Arthur M Blank Foundation PRESIDENT Company valuation: \$6,353,284 Ownership value: \$0

Addresses (1 of 3)	Confirmed Wealth	Real Estate (1 of 5)
1080 W PACES FERRY RD NW ATLANTA, GA 30327  2455 PACES FERRY ROAD NORTH WEST ATLANTA, GA 30339	Confirmed wealth: \$2,936,851,965 Real estate: \$30,996,481 Businesses: \$0 Securities: \$2,905,855,484	1080 W PACES FERRY RD NW ATLANTA, GA 30327  Value: \$13,698,600 Owner: BLANK ARTHUR M

For example, if you click on one of the company names included in the **Securities** tile, a Securities information tile appears with information about the prospect's stock with that organization.

Prospect		Security	
Source:	Thomson Financial	Symbol:	HD
Name:	BLANK ARTHUR M	Issuer name:	HOME DEPOT INC
Filer ID:	15027545	Cusip:	437076102
Relationship:	Chairman of the Board		
Direct holdings		Indirect holdings	
Last transaction date:	12/14/2000	Last transaction date:	12/29/2000
Quantity held:	31,889,600	Quantity held:	1,782,405
Last retrieved price:	\$94.06	Last retrieved price:	\$94.06
Value:	\$2,999,535,776.00	Value:	\$167,653,014.00

Close

In addition, if more than one record is located for a tile, right and left arrow keys display, enabling you to move to the next record located and easily return to the record you are leaving.

ARTHUR M BLANK (Age 71) Show less Screen now

<b>Biographical</b> DOB: 1/1943 Marital status unknown Occupation unknown	<b>HH Members</b> STEPHANIE V BLANK DOB: 1971 (Age 43) Marital status unknown Occupation unknown	<b>Demographic Models</b> Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262
<b>Giving</b> Largest gift: \$1,000,000 EDUCATION \$4,325,000 HOSPITAL, HEALTH CENTER \$2,401,000 INTERNATIONAL, FOREIGN AFFAIRS, \$2,200,000	<b>Securities (1 of 3) &lt; &gt;</b> HOME DEPOT INC Chairman of the Board Total value: \$3,167,188,790 Direct value: \$2,999,535,776 Indirect value: \$167,653,014	<b>Businesses (1 of 5) &lt; &gt;</b> Arthur M Blank Foundation PRESIDENT Company valuation: \$6,353,284 Ownership value: \$0
<b>Addresses (1 of 3) &lt; &gt;</b> 1080 W PACES FERRY RD NW ATLANTA, GA 30327 2455 PACES FERRY ROAD NORTH WEST ATLANTA, GA 30339	<b>Confirmed Wealth</b> Confirmed wealth: \$2,936,851,965 Real estate: \$30,996,481 Businesses: \$0 Securities: \$2,905,855,484	<b>Real Estate (1 of 5) &lt; &gt;</b> 1080 W PACES FERRY RD NW ATLANTA, GA 30327 Value: \$13,698,600 Owner: BLANK ARTHUR M

And lastly, if you want to customize the tiles that appear or what order they appear in, click the gear icon located next to the **Sort by** field to access the Customize prospect search results screen.

**Search**

Find new prospects:

[Show advanced search](#)

Prospect not found? [Add a new prospect and screen now](#)

1 result(s) displayed for "Arthur Blank" in "Atlanta, GA"

**Prospecting Database results**

Sort by:

**ARTHUR M BLANK (Age 71)** [Show less](#) [Screen now](#)

Biographical	HH Members	Demographic Models
DOB: 1/1943 Marital status unknown Occupation unknown	STEPHANIE V BLANK DOB: 1971 (Age 43) Marital status unknown Occupation unknown	Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262

Giving	Securities (1 of 3)	Businesses (1 of 5)
Largest gift: \$1,000,000 EDUCATION \$4,325,000 HOSPITAL, HEALTH CENTER \$2,401,000 INTERNATIONAL, FOREIGN AFFAIRS, \$2,200,000	HOME DEPOT INC Chairman of the Board Total value: \$3,167,188,790 Direct value: \$2,999,535,776 Indirect value: \$167,653,014	Arthur M Blank Foundation PRESIDENT Company valuation: \$6,353,284 Ownership value: \$0

Addresses (1 of 3)	Confirmed Wealth	Real Estate (1 of 5)
1080 W PACES FERRY RD NW ATLANTA, GA 30327  2455 PACES FERRY ROAD NORTH WEST ATLANTA, GA 30339	Confirmed wealth: \$2,936,851,965 Real estate: \$30,996,481 Businesses: \$0 Securities: \$2,905,855,484	1080 W PACES FERRY RD NW ATLANTA, GA 30327  Value: \$13,698,600 Owner: BLANK ARTHUR M

## Simplified the Add New Individual Screen

To help you quickly add new prospects from the search results grid, information located during the search process is now available on the Add new individual screen. For example, if a spouse or business is associated with the prospect in the search results, you can add them easily to the new record by selecting the spouse and/or business name from the drop down menu in either the Select spouse's name or Select a primary business field.

If this information is not included in the search results, but you know the spouse or primary business, click or enter manually. You can then either search your system for the relation or open the add screen and add the relation to your system.

Click the new Set Relationships tab to view reciprocating relationships entered for the prospect. You can edit these entries if necessary.

## Add New Prospect from Search Page

From *Prospects*, **Search external prospecting database**, if after you run a search of the Target Analytics prospecting database, you fail to locate the prospect you want, you can now easily add the new prospect from the Search page. On the Search page, click **Add a new prospect and screen now**. This defaults any search fields you entered, speeding up your data entry.

**Search**

Find new prospects: John Smith Charleston, SC

Show advanced search

Prospect not found? [Add a new prospect and screen now](#)

13 result(s) displayed for "John Smith" in "Charleston, SC"

**Prospecting Database results** Sort by: Full name

**JOHN SMITH (Age 94)**

Biographical	HH Members (1 of 3)	Addresses
DOB: 11/1919 Marital status unknown Occupation unknown	TYRONE R SMITH DOB: 2/1958 (Age 56) Single Occupation unknown	1914 IVY HALL RD CHARLESTON, SC 29407

**JOHN SMITH**

## Enhanced the Advanced Search

On the Search external prospecting database page, to help you search for prospects using the advanced search options, we've moved the advanced options to a single screen: the Advanced search screen.

**Advanced search: Find new prospects**

**Biographical**

Last name  Street address

First name  City

Middle name  State  ZIP

Nickname  HH member last name

Age range  to  HH member first name

Business name

☐ Exact match only ☐ Business identified?

**Wealth & Giving**

Min. confirmed wealth  Real estate value

Max. confirmed wealth  Securities value

Total giving  Household income est.

Largest gift  Discretionary spend est.

Giving categories  Household Mosaic

In addition, after you run the search, fields other than those for name and address information, display at the top of search results grid, enabling you to keep track of the parameters you used for the search.

The screenshot shows a web application interface for searching prospects. At the top, there is a search bar with the text "Find new prospects:" followed by input fields for "Arthur Blank" and "GA". To the right of these fields are "Search" and "Clear" buttons. Below the search bar, a red rectangular box highlights the "Show advanced search" section. This section contains four filter fields, each with a close button (X) to its right: "Age (min)" with a value of 70, "Age (max)" with a value of 80, "Min. confirmed wealth" with a dropdown menu showing "\$250,001", and "Largest gift" with a dropdown menu showing "\$50,000 and up". Below the highlighted section, there is a link "Prospect not found? [Add a new prospect and screen now](#)". Below that, it says "1 result(s) displayed for 'Arthur Blank' in 'GA'". The main section is titled "Prospecting Database results" and includes a "Sort by:" dropdown menu set to "Full name". Below this, there is a table of results for "ARTHUR M BLANK (Age 71)". The table has three columns: "Biographical", "HH Members", and "Demographic Models".

Biographical	HH Members	Demographic Models
DOB: 1/1943 Marital status unknown Occupation unknown	STEPHANIE V BLANK DOB: 1971 (Age 43) Marital status unknown Occupation unknown	Mosaic: Household income: Over \$250,000 Discretionary spending: \$79,262

This makes it easy for you to adjust your parameters and refine your search if necessary, without having to open the Advanced search screen again.

To remove any advanced search options selected for the search, click the "X" in the parameter display at the top of the results grid. You can then update the search results minus the deleted parameter.

## New Advanced Search Filters

For the external prospecting database search, we added a number of new search filters, such as:

- Age range
- Household member last name
- Household member first name
- Business identified check box
- Confirmed wealth changed to 2 options: Min confirmed wealth and Max confirmed wealth
- Giving categories
- Total giving
- Largest gift
- Real estate value
- Securities value
- Household income estimate
- Discretionary spending estimate
- Household Mosaic

Some of the new filters are the result of the three new data sources we added this release.

## New Data Sources for Prospect Search

We added NOZA, Experian, and Thomson data sources to the external prospecting database search.

- **NOZA data source** – is the world's largest searchable database of philanthropic data. NOZA's data is comprised of detailed charitable donation information that has been collected from publicly-available Internet locations.

NOZA data appears on the Giving tile.

- **Thomson data source** – is the leading provider of US Securities and Exchange Commission (SEC) insider information and business information relating to the top officers/directors, including compensation and earnings information. Data has been collected from mandatory filings of form 144 with the SEC and annual corporate reporting.

Thomson data appears on the Securities tile.

- **Experian data source** – provides detailed consumer information from self-reported and credit sources to identify wealth indicators, such as household income and home value, as well as the number of children, discretionary spending estimate and vehicle value.

Experian data appears on the HH Members and Demographic Models tiles.

Prospecting Database results		Sort by: Full name	
ARTHUR M BLANK (Age 71)			
Screen now			
<b>HH Members</b>	<b>Demographic Models</b>	<b>Giving</b>	<b>Securities (1 of 3)</b>
STEPHANIE V BLANK	Mosaic:	Largest gift:	HOME DEPOT INC
DOB: 1971 (Age 43)	Household income: Over \$250,000	EDUCATION	Chairman of the Board
Marital status unknown	Discretionary spending: \$79,262	HOSPITAL, HEALTH CENTER	Total value: \$3,167,188,790
Occupation unknown		INTERNATIONAL FOREIGN AFFAIRS	Direct value: \$2,999,535,776
			Indirect value: \$167,653,014

When you use advanced search feature, you can also filter your search based on fields specific to the new data sources. For example, we added HH member first name and HH member last name, Household income est., Discretionary spending est., and Household mosaic fields to accommodate the Experian data source addition.

When you add a prospect to your database, you can access the new data source information from the prospect's Wealth and Ratings record.

- NOZA giving information can be found on the Giving tab.
- Thomson securities information can be found on the Assets tab.
- Experian Household member, income, and demographics information can be found on the Biographical Information tab.

If this information is not included in the search results, but you know the spouse or primary business, click or enter manually. You can then either search your system for the relation or open the add screen and add the relation to your system.

Click the new Set Relationships tab to view reciprocating relationships entered for the prospect. You can edit these entries if necessary.

# Research Lists

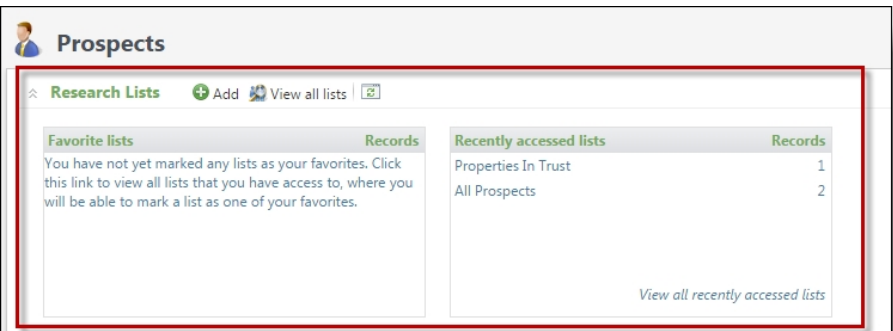
To help researchers manage prospects, we added Research Lists, which enable you to efficiently build lists based on simple criteria. You can also leverage a powerful tool set included with the lists. The tools enable you to screen, analyze, and prioritize your prospects.

Research Lists replace Research Groups, but the replacement comes with a number of enhancements that make the lists more workable.

**Note:** The new Research List functionality includes the ability for you to categorize your lists. **Research List Category** is a code table in *Administration* in the Research List code table category. You can determine which categories are most meaningful for your organization and users.

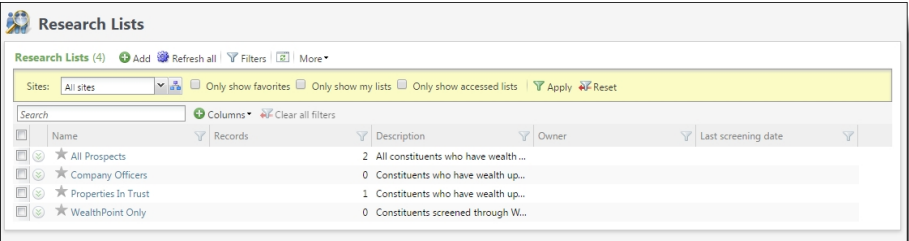
## View Research Lists from the Prospects Page

We understand that as researchers you want to see useful research list information from the main Prospects area. When we added research lists, we added favorite and recently accessed sections to the top of the Prospects page. From here, you can quickly open any list included in the Favorite lists or Recently accessed lists box, add a new list, and view all lists.



## Research Lists Page

The main research lists page can be accessed by clicking **View all lists** from the Prospects page. This takes you to an unfiltered list of all your saved lists. Here you can manage your lists, delete old ones, and perform top level actions on individual lists.





- **Filters:** Selecting **Filters** provides you with three filtering options: Favorites, Accessed Lists, and lists you created.
- **Favorites:** To mark a list as a favorite, just click the star next to the name. The list will then display in your favorites list on the Prospects page.
- **Actions available:** On each list, if you select the drop down to the left of the name, you can access a number of actions.
  - Edit the list
  - Delete the list
  - Assign a prospect manager to all members of the list
  - Generate a map locating all members of the list
  - Generate a research list report
- **Columns:** Because the Research lists page includes enhanced list functionality, you can reorder (drag and drop to the preferred location) and add columns. You can also quickly search for your list or filter the lists based on a specific column.
- **Categories:** Categories were added to enable further segmentation of your lists. You assign your list to a category from the Add/Edit research list screen. You create categories in Administration.

## No More Tabs

When you open a research list, the new list page displays wealth summary information in the new summary section at the top of the page.

**Research Lists**  
**Alumni - Research List**

Description:  
Owner: [redacted]  
Category: [redacted]  
List members: 4,276  
Sites: [redacted]

Allow others to access: Yes  
Allow others to edit: Yes  
List can be refreshed: Yes  
Auto refresh nightly: Yes

**WealthPoint**  
Subscription: Professional  
Group screens remaining: [redacted]  
Screen list Request more screens

**Members (4,276)** Add member Edit Refresh Research list report Delete list More

Name (Last, First...)	Prim...	Total identified ass...	Income identified	Real estate identifi...	Wealth indicators i...	Businesses identified
Adamson, Mark D.	SC	\$44,156,782.60	\$5,243,703.00	\$2,669,825.00	14	\$25,500,000.00
Lehmann, Marjalice	SC	\$10,322,715.08	\$1,600,000.00	\$0.00	1	\$8,500,000.00
Woodson, George	SC	\$10,211,357.54	\$1,600,000.00	\$0.00	1	\$8,500,000.00
Murray, Kendal	SC	\$30,634,072.62	\$4,800,000.00	\$0.00	3	\$25,500,000.00
Gonzalez, Alexander	SC	\$30,634,072.62	\$4,800,000.00	\$0.00	3	\$25,500,000.00
Journey, Ali	SC	\$13,634,036.62	\$4,800,000.00	\$0.00	1	\$8,500,000.00
Reece, Rosemary	SC	\$18,822,703.08	\$1,600,000.00	\$0.00	2	\$17,000,000.00
Norton, Carline	SC	\$13,522,727.08	\$4,800,000.00	\$0.00	1	\$8,500,000.00
Goodwin, Toby	SC	\$11,811,345.54	\$3,200,000.00	\$0.00	3	\$8,500,000.00
Schuster, Daniel	SC	\$18,822,703.08	\$1,600,000.00	\$0.00	2	\$17,000,000.00
Garber, Earline	SC	\$13,300,012.00	\$4,800,000.00	\$0.00	1	\$8,500,000.00
Duron, Shanna	SC	\$10,211,369.54	\$1,600,000.00	\$0.00	2	\$8,500,000.00
...	...	...	...	...	...	...

You no longer have to click to the Wealth Summary tab. From here, you can track your remaining screens, view your subscription level, and even request more screens.

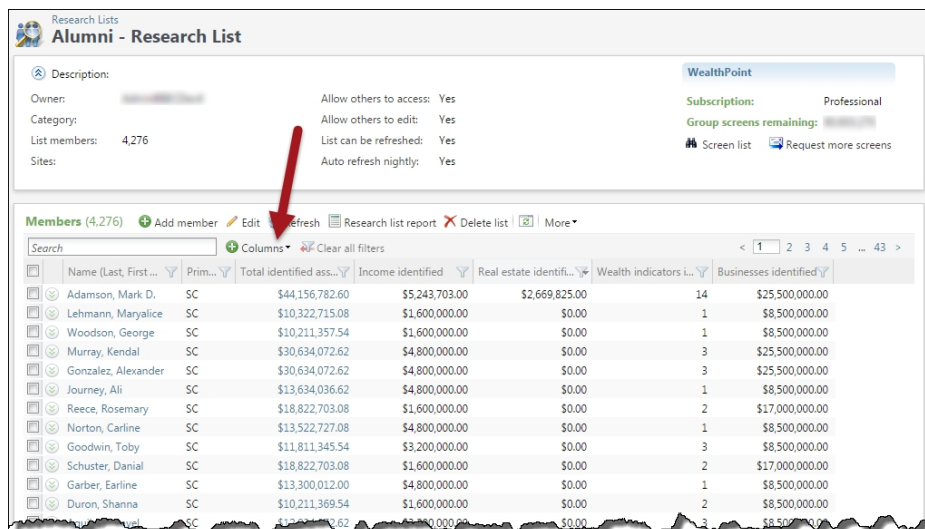
Also, the Members tab is now a Members list with all related tasks living in the list. From here you can edit the list, map members locations, delete members, copy members to other lists, disable WealthPoint updates on member records, add new members to the list, and more.

We're saving you extra clicks so you can see everything at a glance and perform research tasks faster!

## Enhanced Research List Functionality

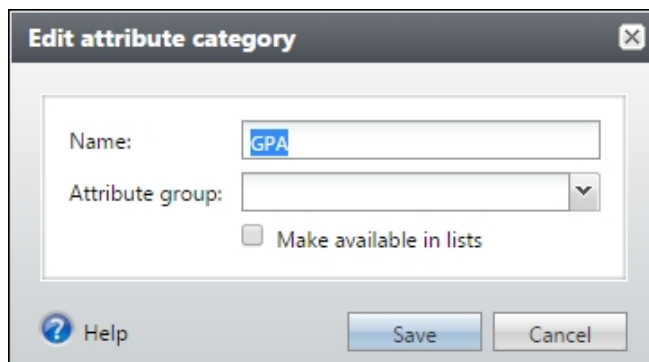
As a researcher, you need to see the members of the group and sort by various wealth, giving, affiliation, and biographical attributes so that you can effectively focus on the top prospects. To aid you in this effort, we added enhanced list functionality to Research Lists.

With the advanced list functionality, you can filter, reorder and search content included in a list. One of the best improvements with lists is that you can now display only columns you feel important for managing your list.



Research lists include a large set of Biographical, Wealth, Giving, and Ratings fields you can set as columns and filters. You can also include attributes as columns.

To make attributes available in your lists, from *Administration*, click **Attribute Categories**. Open the Attribute category you want available on your lists and click **Edit**. The Edit attribute category screen appears.



Select **Make available in lists** and click **Save**.

Each user that has rights to view a list can set the columns they want to view and those columns remain the same the next time they return to the list. When a new list is built, it returns with a default set of columns.

## Easy to Use Add Research List Screen

When you create a new research list, you can easily control who is included in your list, and you can do this without creating or editing a selection file in *Query*. You now have direct access to the most common fields used to build lists. The fields are arranged based on five categories: Biographical, Education, Giving, Ratings, and Wealth.

If your criteria needs are more complex, you can still use selections or use a combination of both to create the list.

To add more than one criteria from a category, add each one at a time. You can remove criteria as well.

Other updates to the add new research list include:

- **Categories:** You can now set categories when you build your list. This enables easier list management .
- **Populate process is gone:** You no longer have to run a populate process step when you want to refresh your list. Now, you can set a refresh option when you add the list. If the refresh option is included when the list is created, you can simply click a button on the Research lists page to refresh your lists. You can also choose to have the lists update automatically nightly.
- **Editing lists:** You can easily change the criteria used to build your list by selecting the Edit option under the list. When you then rebuild the list with your changes, the program asks if you want to just add new people to the existing list or rebuild the list entirely.
- **Sites:** Research lists respect site security the way research groups did. No loss of functionality in the update.

## More Flexibility with Research Lists

You can now select and act on multiple records at a time in a research list:

- Screen a selected set of records, instead of the entire list or one record at a time. This enables you to keep your list intact but work on specific prospects inside the list. You can perform these actions on up to 100 records at a time.
- Assign multiple prospects to a fundraiser.
- Copy specific prospects to a new group. After using the list functionality to filter and manipulate the list down to a set of records you feel comfortable with, you can select and copy those prospects to their own list or to an existing list. This is especially helpful if you want to build a list for someone else to work on or want to ensure your top prospects are separated for special attention.

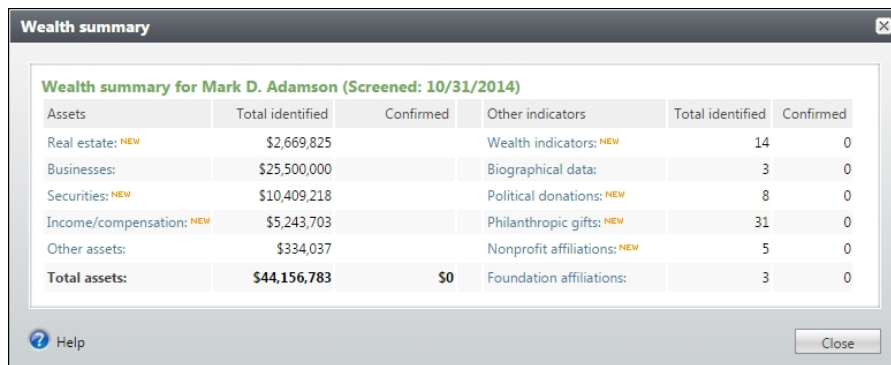
For a specific prospect member in the list, you can:

- Edit their research details, such as research status, prospect manager, and research summary.
- Copy them to a different list.
- Assign a prospect manager.
- Disable WealthPoint updates.
- Remove them from the list.

## Access a Prospect's Wealth Summary from a Research List

Prospect researchers and fundraisers working in a list can now easily access summary wealth information on a list member without having to leave the research list.

From a research list, include the **Total confirmed assets** and **Total identified assets** columns. Then, in the Members list, click the link in either the **Total confirmed assets** or **Total identified assets** column. The member's Wealth summary screen displays.



**Wealth summary**

**Wealth summary for Mark D. Adamson (Screened: 10/31/2014)**

Assets	Total identified	Confirmed	Other indicators	Total identified	Confirmed
Real estate: <b>NEW</b>	\$2,669,825		Wealth indicators: <b>NEW</b>	14	0
Businesses:	\$25,500,000		Biographical data:	3	0
Securities: <b>NEW</b>	\$10,409,218		Political donations: <b>NEW</b>	8	0
Income/compensation: <b>NEW</b>	\$5,243,703		Philanthropic gifts: <b>NEW</b>	31	0
Other assets:	\$334,037		Nonprofit affiliations: <b>NEW</b>	5	0
<b>Total assets:</b>	<b>\$44,156,783</b>	<b>\$0</b>	Foundation affiliations:	3	0

Help Close

If you click any assets or indicator links on this screen, you navigate to the prospect's wealth and ratings record, to view more information about the wealth detail. You can always navigate back to the list by clicking on the list name on the Wealth Summary tab, under the **Research Details** section.

The "New" icon identifies assets and indicators that have been updated since the last time this record was viewed.

## View Research Summary and Research List Association from Wealth Summary Tab

To enable researchers to easily identify research list membership and navigate to the lists, this information now displays on the Wealth Summary tab of the prospect's Wealth and Ratings record. It is included in the **Research details** section.



**Research details** (Updated: 10/23/2014 by AdminBBECDev4) Edit Flag prospect

Research status:	Confirmed	<b>Research summary</b>
Prospect manager:	Chasidy Alexander	
Lists associated to:	Properties In Trust All Prospects	Initial research complete. Mr. Adamson shows great interest in the University and recommend we request money towards our science foundation.

The order in which the lists display is based on:

- Most recently accessed by current user
- Most recently added to a research list (used if current user has not accessed)

Up to 10 groups can display on the prospect's Wealth and Ratings record.

Also in the Research details section, you can edit the research information for a prospect including a summary, research status, and assign or edit a prospect manager.

## Sort Research Lists by Last Name

In Research Lists, you can now sort members of the list by last name. Your default column and sort options have not changed. From a research list, click Columns. In the column options, you can now select Name (Last, First Middle).

You can add this sort option to existing research lists. Open the research list you want to update, then edit the columns displayed in the data list.

## Attribute Options Added to Research List Columns

To help you maximize the usability of your research list view, you can now select model scores and custom attributes as column options in your list. For example, if you create a "General Fund" Model Scores attribute, and you want this attribute displayed in a research list grid, from the list grid, select the Columns drop-down menu and select the new "General Fund" attribute. Click Apply, and the "General Fund" column is added to the grid.

**Note:** When creating the attribute in Administration, make sure to select Make available in lists on the Add an attribute category screen.

## Experian Data Source Added

To help prospect researchers build a prospect profile by easily finding a prospect's age, household members, personal, and demographic information, we've incorporated the Experian data source in our WealthPoint screens.

For Professional level subscribers, this means that a WealthPoint screen run from the prospect's Wealth and Ratings page or from a research list will return any located household income, discretionary spending, and mosaic information, in addition to the standard name, birth date, marital status, and occupation information that is available for all subscription levels. It also adds the first located household member.

All other subscribers receive the standard name, birth date, marital status, occupation, and household member information.

For example, if you open a prospect's Wealth and Ratings record and click on the Biographical Information tab, and you notice your prospect's Personal information at the top of the tab does not include birth date or marital status information, you can run a wealth screen on the record to see if the Experian data source can locate the missing information.

## Additional Household Information from Experian

To help you better identify prospects correctly as well as better understand households and relationships, we return additional household member information from Experian. You can view up to five household members.

Because we provide additional household members, the first person listed as an additional household member may not be the spouse.

In the search, you can scroll through additional household members, if present.

When you screen the prospect from the Prospecting Database results, on the Add new individual screen, we recommend you select the spouse from the list of additional household members returned. When you select the spouse to include on the wealth and ratings record, you improve the results you receive when you perform a wealth screen.

On the prospect record, from the Biographical Information tab, under Biographical Data, upon your next wealth search the data row is added with the Experian information. If the data includes additional household members, they are added to the prospect record.

When you add new prospect records from the Target Analytics search, the Experian data row is added with up to five household members automatically included.

You can review and edit the household members information on the Experian record.

**Note:** The additional household information from Experian includes a **Household Income Estimate**. This is a code table in *Administration* in the Prospect Research code table category. The values for this code table are pre-populated with the values Experian uses to categorize household income estimates.

## Management Tools Added for Experian Data

You can now edit, reject, confirm, and delete Experian data included on a prospect's Wealth and Ratings record. To access these tools, select the Biographical Information tab, under the Biographical data section, expand the Experian record.

Biographical data (4) Add Filters More Total identified: 4 Total confirmed: 3

Name	Birth date	Source	Confidence
MICHAEL S DELL	2/1965	Experian	5

Confirm Reject Clear status Edit Delete

**Prospect demographics**

Name: MICHAEL S DELL Household Mosaic: A01 - American Royalty  
 Birth date: 2/1965 Age: 49 Household income: \$35K - \$50K  
 Marital status: Married Discretionary spending: \$87,900.00  
 Occupation: Unknown

**Household members**

Name	Birth date	Age	Marital status	Occupation
SUSAN L DELL	1/1964	Age: 50	Married	Unknown
KIRA E DELL	1/1992	Age: 22	Unknown	Unknown
ALEXA DELL			Unknown	Unknown
ZACHARY DELL			Unknown	Unknown
JULIETTE DELL			Unknown	Unknown

Source: Experian  
 Match code: P04 - Last Name, Primary Address, First/Middle Combination  
 Notes: Added from Prospecting Database

From an Experian record, you can also click the link for the **Household Mosaic** field. This opens a new window to the Experian Mosaic USA Interactive Guide. The guide provides a description of what people in this demographic range are like. Your constituent may not have all these characteristics but it can help you build a profile and understand better what motivates and what are the traits of constituents in this mosaic group.

## New Record State Column for Real Estate Assets

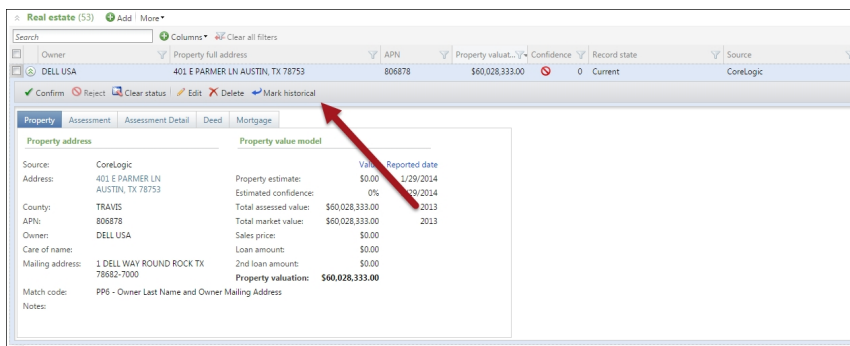
**Note:** This change was released in **Blackbaud CRM** 3.0 patch 61.

Due to individual counties changing APN numbers, we've added a **Record state** column to help you prevent duplicate real estate records inflating your prospect's real estate asset total. Real estate records can have a status of "historical," "current," or "new."

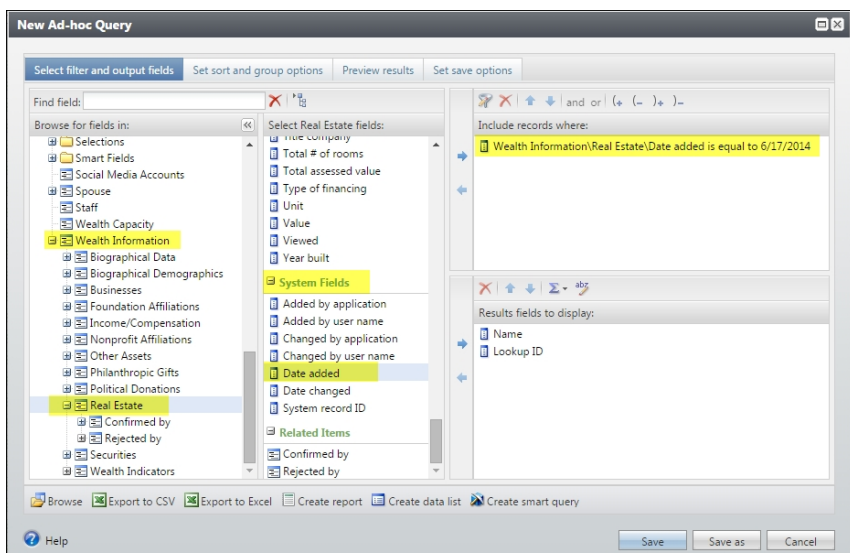
APN (assessor parcel number) is a unique identifier for real estate. However, APNs can change and without a consistent pattern because individual counties determine how to format their APN. For example, an APN county identifier changed from 01261801440000 to 123119. The issue does not affect new prospect wealth screenings, only when you re-screen an existing prospect who lives in a county whose APN has changed. We want to give you the opportunity to track historical and current properties to accurately determine the potential of your prospect as a major giver to your organization. We do not want to take data away from you to prevent these duplicates from occurring when APNs change.

With the update to 4.0, we can help you prevent these errors going forward. However, if you have re-screened prospects prior to this release in a county that has undergone an APN change, you may have duplicates you want to clean up in your database. We have several solutions to help you prevent and clean up duplicates in your database.

- When you research an individual prospect, on the wealth and ratings record, Assets tab, you can manually delete or reject the duplicate property if you notice two properties with the same address but different APNs. If you do not want to delete the duplicate, you can mark the property with the old APN as historical.



- You can create a constituent query and include the name and lookup ID for the fields to display and filter by real estate date added since you last re-screened prospects.



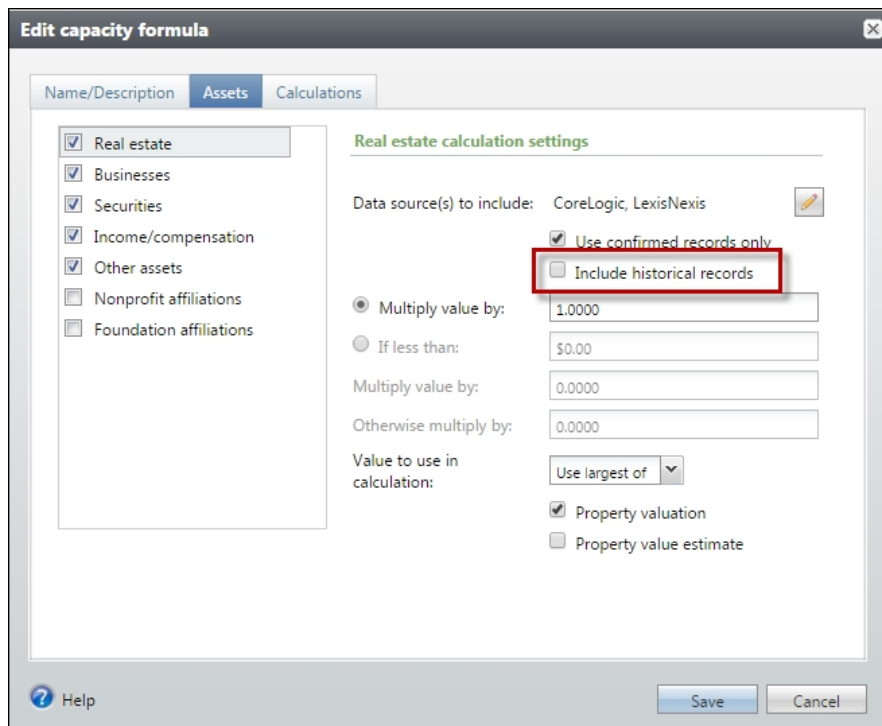


If you have not re-screened people for a long period of time leading up to the 4.0 update, you only need to query on the dates since you re-screened. For example, if you annually re-screen people during August, your query only needs to search for real estate added since 08/01/2014.

- If you have not re-screened recently, wait until your database updates to 4.0 before you re-screen prospects for new wealth information. The new record state column will use the following logic to prevent duplicates:
  - **New** – When you wealth screen, if a property doesn't match an existing record in your database but exists in CoreLogic, the property asset is marked as "New." Once a user views this record, the status updates to "Current."
  - **Historical** – When you wealth screen, if a property was in your database before the screen but doesn't match any records in CoreLogic, the property asset is marked as "Historical."
  - **Current** – When you wealth screen, if an existing property in your database matches a record in CoreLogic, the property asset is marked as "Current."
- If you have a large number of duplicates and would prefer to delete existing real estate records instead, contact Customer Support. They can assist you with a process to delete existing CoreLogic real estate records before you perform your wealth screens.

**Note:** When you re-screen a prospect, if you have manually changed the record state for a property, we will not update the property status when the record is refreshed after wealth screening completes. We will update the real estate data but not the property record state for assets that you specifically updated.

To assist with the accuracy of real estate values, we also updated the capacity formulas . By default, **Include historical records** is not selected as part of the real estate calculation settings. You can select the option to include if it is important to one of your capacity formulas.



While capacity formulas can include historical records, prospect research reports, real estate identified fields, real estate confirmed fields, and real estate summaries do not include historical properties.

## General Prospects Enhancements

Also in this release, we've provided some general updates to improve your experience with prospects and major giving constituent work.

## Track Solicitors on Opportunities

Currently, fundraisers on a major giving plan are credited for all revenue raised for all opportunities on the plan. With this release, you now have the ability to credit individual fundraisers for their associated opportunities only. This provides the ability for you to track the revenue that fundraisers generate in greater detail.

To assign solicitors to an opportunity, open a major giving prospect and select a major giving plan. From the plan record, go to the Opportunities tab and select an opportunity. On the Opportunity page, go to the new Solicitors tab and click **Edit**.

Cecil Aaron > Major giving  
**\$10,000.00 (Response pending) - Opportunity**

Prospect manager: Kevin Balk	Start date:	Plan stage:	Prospect address: Dover, NC 28526
Primary manager: Letty Bauer	Start date:		Phone number: 987-325-5813
Secondary manager: Robt Allan	Start date:		Email address: Cecil.Aaron@blackbaud.net

Details Associated Revenue Naming Opportunities Campaigns **Solicitors**

**Solicitors on opportunity** Edit 2

Letty Bauer - Primary manager  
 Robt Allan - Secondary manager

From the Edit solicitors on opportunity screen that appears, the default option is set to **All plan solicitors**. To select individual solicitors to associate with the opportunity, choose **Selected plan solicitors**. Once selected, all active plan solicitors appear on the screen.

**Edit solicitors on opportunity**

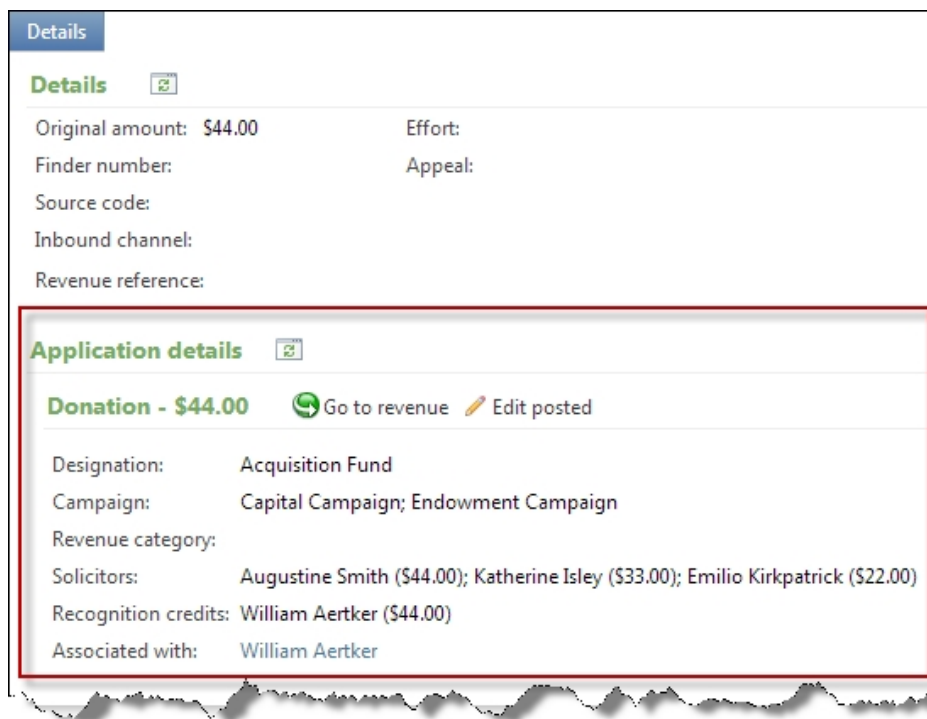
☐ All plan solicitors  
☒ **Selected plan solicitors**

- ☐ Christopher Taylor - Primary manager
- ☐ Cynthia Schapiro - Secondary manager
- ☐ Melvin Frantz - Secondary solicitor

Help Save Cancel

After you add solicitors to an opportunity, you can view them on the Solicitors tab on the Opportunity page, as well as in the Opportunity details view on the Opportunities tab of the major giving plan page. The solicitors and their opportunity totals display on the Fundraiser and Major Giving Management pages.

Solicitors associated with an opportunity that is linked to revenue are also associated with the revenue. To view this information, from the revenue record, click the Details tab. Solicitors are listed under **Application details**.



**Details**

Original amount: \$44.00      Effort:

Finder number:      Appeal:

Source code:

Inbound channel:

Revenue reference:

**Application details**

**Donation - \$44.00**      [Go to revenue](#)      [Edit posted](#)

Designation: Acquisition Fund

Campaign: Capital Campaign; Endowment Campaign

Revenue category:

Solicitors: Augustine Smith (\$44.00); Katherine Isley (\$33.00); Emilio Kirkpatrick (\$22.00)

Recognition credits: William Aertker (\$44.00)

Associated with: William Aertker

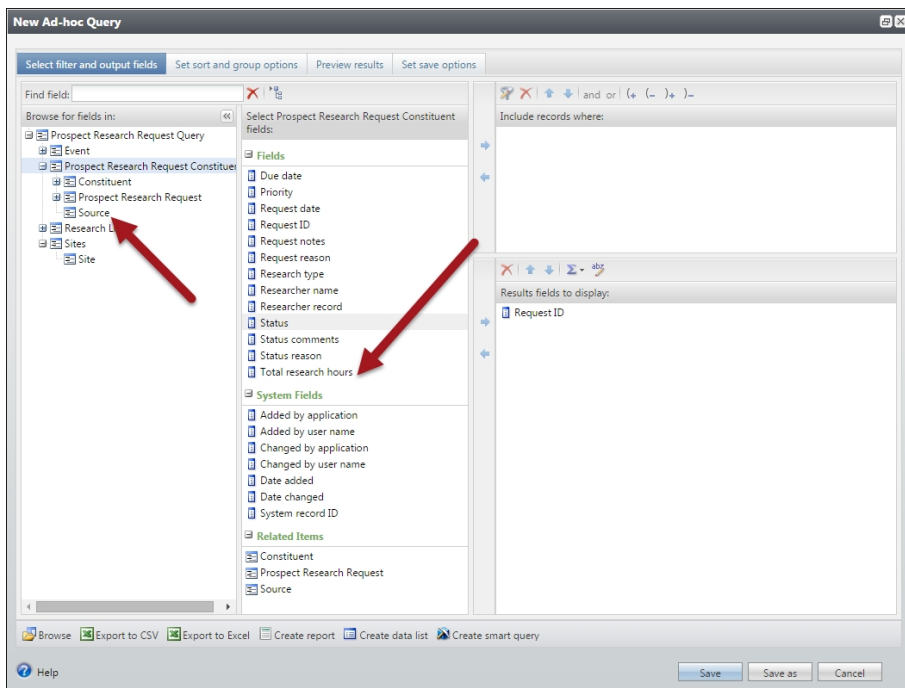
## Delete Constituents with WealthPoint History

You can now delete a constituent that has a WealthPoint search history or a Research Request history.

## Additional Prospect Research Tracking Information Added to Query

When you complete a prospect research request for an individual, if your organization tracks the total number of research hours, you can now filter and track those hours in *Query*.

From a prospect research request query, under the **Prospect Research Request Constituent** node, you can filter and display results with the new **Total research hours** field. Under the **Prospect Research Request Constituent** node, we also added a new **Source** node, with additional fields to filter and display results about the completed individual research request.

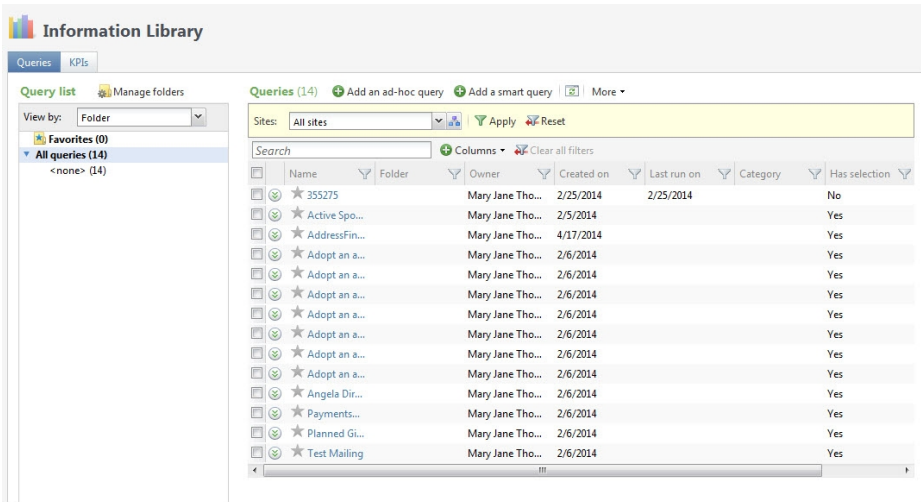


## Query and Export

## Information Library

**Show Me:** [Watch this video to learn more about the information library.](#)

Queries and KPIs now appear in the new information library. To access the library, from *Analysis*, click **Information library**. The library opens directly to the Queries tab. To access KPIs, click the KPIs tab.



The functionality of queries and KPIs is unchanged, but the library offers features to better organize and navigate your queries and KPIs.

- **View Options:** The new left-side pane allows you to view queries by folder, category, owner, or record type, and to view KPIs by folder, type, or record type. Select an option from the **View by** field, and the results display below.
- **List Updates:** The list of queries or KPIs is easier to navigate. Use the **Search** field to quickly search for a query or KPI, use filters on each column, and select the columns to see. To view different columns, click **Columns** and select the ones you want to display, including new columns such as **Last run by**, **Last run duration**, **Last run on**, and **Last run result count**.
- **Folders:** To organize your queries or KPIs by folders, click **Manage folders**. The Manage Folders screen works the same as it did before this update. To add queries or KPIs to a folder, first select "Folder" in the **View by** field. Then select the checkbox next to the query or KPI you want to move and click **Move**. Select a folder and click **Save**. You can move multiple queries or KPIs at one time.
- **Favorites:** To mark queries and KPIs as favorites, click the star next to the query or KPI name.
- **Categories:** To add queries to a category, first select "Category" in the **View by** field. Then select the checkbox next to the query you want to move and click **Move**. Select a category and click **Save**. You can move multiple queries at one time.

## Export Limit in Query

The 500 row export limit for queries no longer exists. Now, when you export a query, you view all rows. This allows you to create a quick export directly from a query that includes all query results.

Because there is no longer a row limit, we have removed the **Create export** button for smart queries. To download results from a smart query, click the *Excel* icon and select whether you want to download the results as an .xlsx or .csv file. This option downloads all results.

**Note:** Certain web.config settings can limit the number of rows exported from queries. These settings default to 100,000 rows. If you need your exports in *Excel* to include more than 100,000 rows, you can change the web.config settings for `WebShellAdHocQueryExportMaxRows` for ad-hoc queries and the settings for `WebShellSmartQueryExportMaxRows` for smart queries.

To access queries, from *Analysis* click **Information library**.

## Code Table Field Values

When you make a change to a code table entry, queries that use that criteria value now identify the new value as the equivalent for the old value. Previously when you changed a code table entry, queries using that value did not recognize the new value as a match. Therefore, query results displayed differently than before the code table change.

For example, if you previously changed a constituency from "Affiliated organization" to "Affiliate" in the **Constituency code** table, a query that used this criteria did not include constituents with the new "Affiliate" code because the program did not recognize the two values as the same. Now when you edit a code table entry, the program assumes the old and new values represent the same data so queries update to reflect this. In this example, both existing constituents with a constituency of "Affiliated organization" and new constituents with a constituency of "Affiliate" appear in the results.

**Note:** To make sure this functionality works as intended, only rename entries that serve the same purpose. You should always create new code tables for a new purpose and you can mark old values you no longer need as inactive.

To make sure code table field values update for existing selections, open the query used by a selection and save it again.

To access your queries, from *Analysis*, click **Information library**.

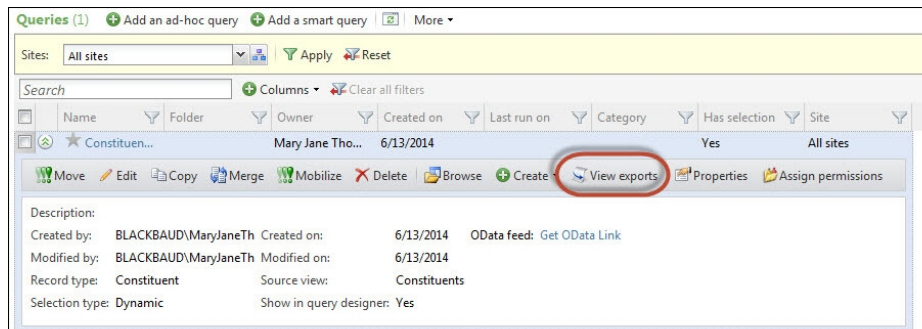
## View Query Results on Save

When you save a query, the program now navigates you directly to the query results. Previously, you navigated to the query list.

## View Exports Associated with a Query or Selection

You can now see exports associated with a query directly from the query or from selections based on a query. This feature includes a number of improvements make it easier to navigate export information.

- You can now view exports associated with a query directly from *Information library*. From *Analysis*, click **Information Library**. On the Query tab, expand the query you want to see exports for and click **View exports**. You can also click **View exports** under **Tasks** for any query record.



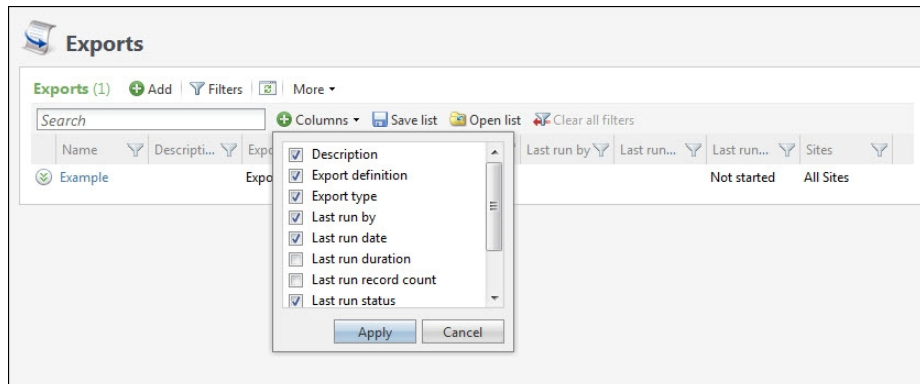
- From the Selections page, you can now view the exports associated with each selection. From *Analysis*, click **View selections**. On the Selections page, expand a selection and click **View exports** to view all exports associated with that selection. You can also click **View exports** under **Tasks** for any selection record.

## Create Export from a Selection

You can also create an export directly from a selection. Previously, you had to do this from the Export page. From *Analysis*, click **View selections**. On the Selections page, expand a selection and click **Create export** to create an export of the selection.

## Manage Exports

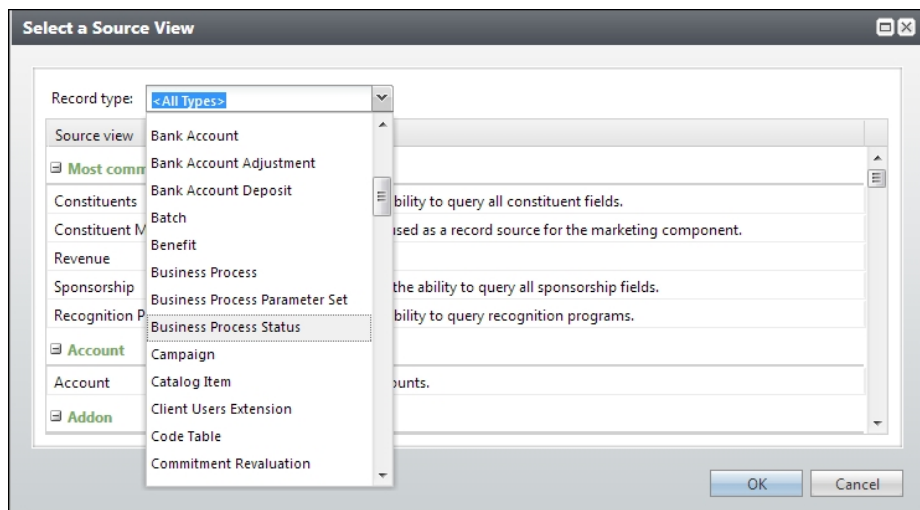
The Exports page now includes filtering functionality. To access this page, from *Administration*, click **Export**. To filter exports by a column, select it and use the **Columns** button to add or remove it from your view. This allows you to easily find existing exports so you do not risk creating a new export when one exists that fits your needs.



The default **Query / Selection** column displays the query or selection the export is based on. To navigate directly to it, click the name of the query or selection. Use this link to confirm that your export includes the information you want.

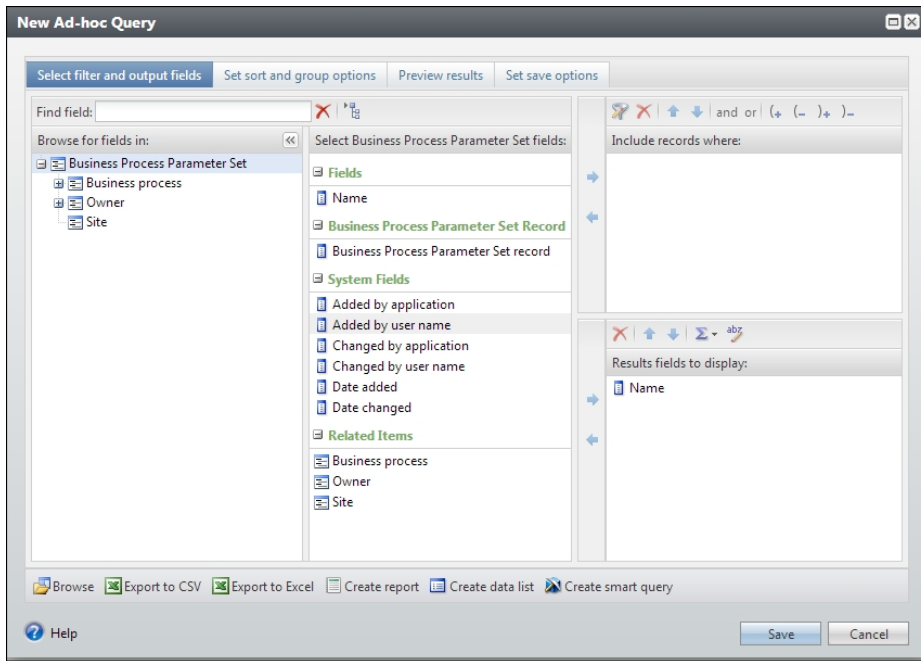
## Query Source Views for Business Processes

In previous versions, you could use the Business Process query view to view business process properties, such as the name, description, and whether the process generates output. Now you can also select a Business Process Parameter Set or Business Process Status as the source view for an ad-hoc query. Querying on business processes can help you identify processes and records you may not know exist in your system.

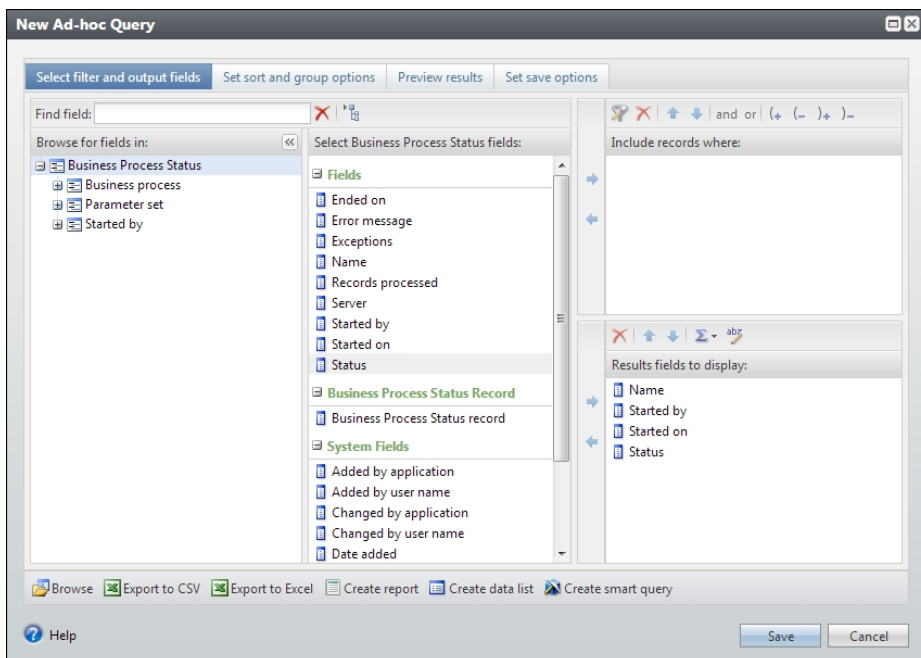




The Business Process Parameter Set query view provides information about business process parameters, such as the name of the parameter set and who created it.

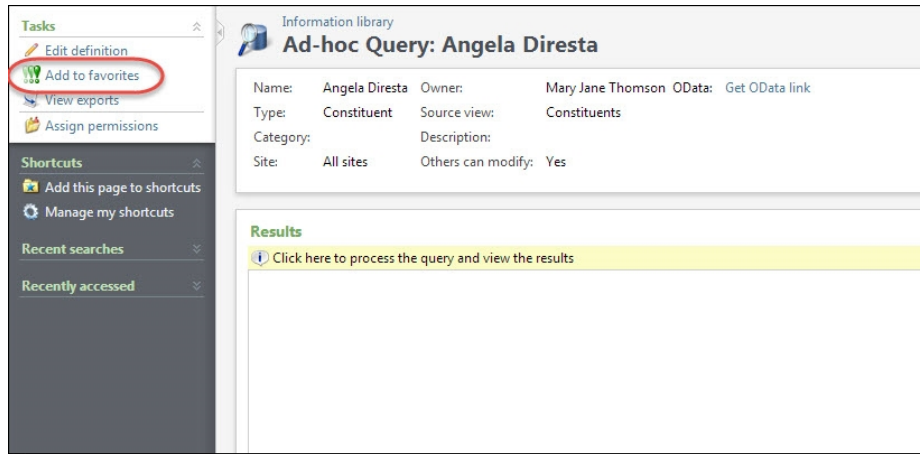


The Business Process Status query view provides information about business process statuses, such as the current status (Running, Completed, Completed With Exceptions, or Did Not Finish), when the process was run, who ran it, and the number of records processed.



## Make Queries or KPIs Favorites from the Query or KPI Record

You can now mark a query or KPI as a favorite from the query or KPI record. From the *Information library*, click a query or KPI name to access the record. To mark the query or KPI as a favorite, under **Tasks**, click **Add to favorites**.

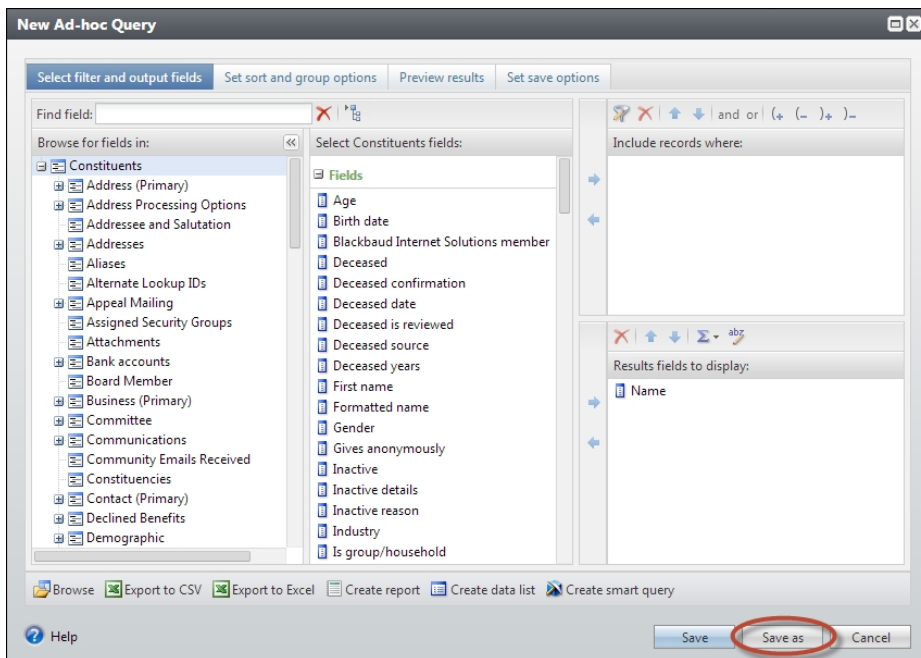


You can also mark a query or KPI as a favorite from the library by clicking the star next to the query or KPI name.

## Save As Option for Query

A new **Save as** option is available when you create and edit queries on the Ad-hoc Query screen in *Analysis*. This allows you to change existing queries and save them as new queries. Previously, you copied queries to create new versions of them. This enhancement reduces the number of steps to update existing queries so you can work more efficiently.

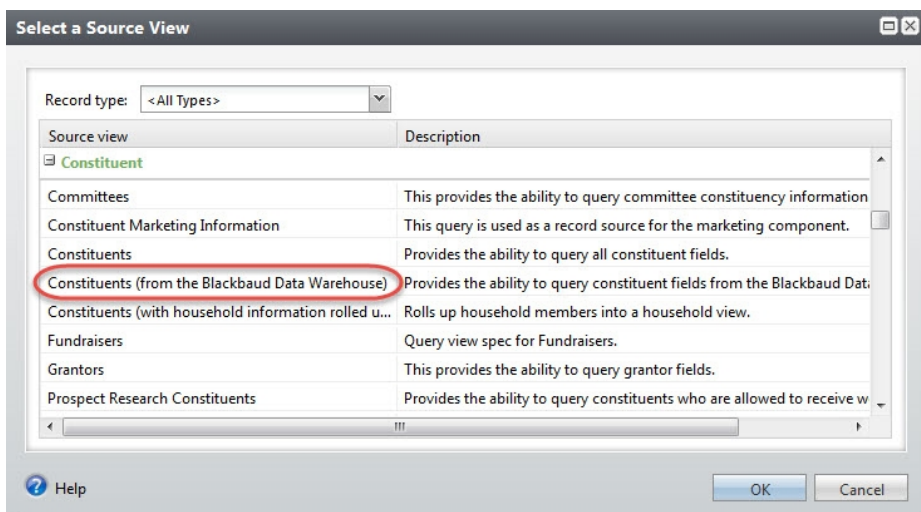
**Note:** The new queries include all the permissions and other properties from the original queries.



## Constituent Query from the Data Warehouse

**Show Me:** [Watch a video about queries from the Blackbaud Data Warehouse.](#)

You can now create a constituent query from the Blackbaud Data Warehouse. When you create an ad-hoc query, you can use the new Constituent (from the Blackbaud Data Warehouse) source view.

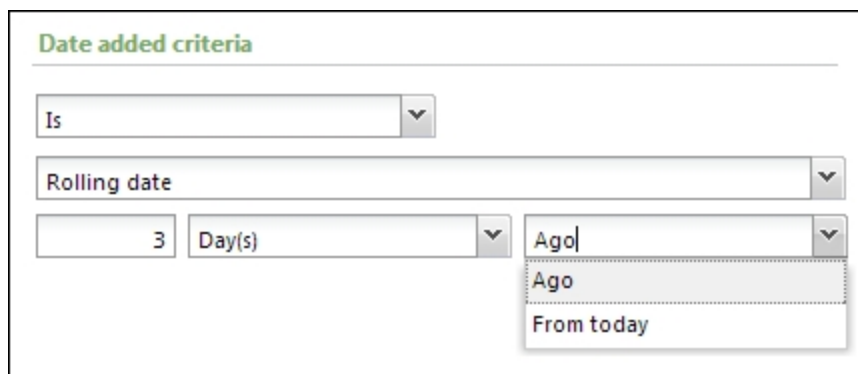
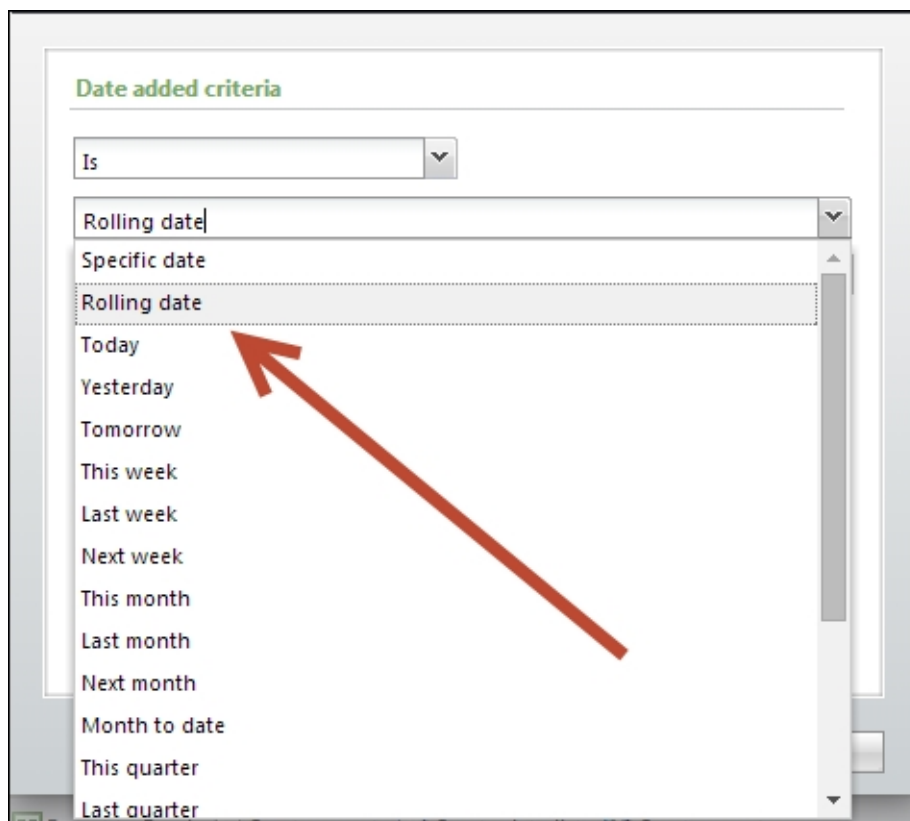


This query source view is similar to the existing constituent query. In addition to the options available in the existing constituent query, this source view includes primary email and phone number fields under Constituent. This allows you to include primary contact information for your query results without excluding constituents who do not have a primary email or phone.

This query source view does not include all the options available in the existing constituent query. This new source view is designed to provide only the most commonly used fields to simplify the experience of creating a constituent query.

## Rolling Date Filter Option

When you use the Constituents (from the Blackbaud Data Warehouse) source view to create an ad-hoc query, a new rolling date option is available for date field filter criteria. A rolling date is a date range, relative to the current date, that either occurred in the past or will occur in the future. For example, you can now create a query to search for constituent records that were added three days ago, or memberships that will expire three months from today.



You can specify rolling date ranges in day, week, month, quarter, year, and fiscal years when you use the following date criteria operators:

- Is
- Is not
- Before
- After
- On or before
- On or after
- Between
- Not between

**Note:** To use fiscal year ranges, you must configure fiscal years in *Administration*.

Previously, you could only use pre-defined date filters such as yesterday, last week, tomorrow, or next week. This enhancement eliminates the need for you to manually change queries when the range is the only filter to update.

**Note:** The "Rolling date" option is also available when you create custom query views from the data warehouse with **Blackbaud CRM** SDK. For information about how to include it in customizations, see the [Infinity SDK](#) online help.

For detailed information about each combination of rolling date options you can select, refer to Date Filters for Date Fields in the *Query and Export Guide*.

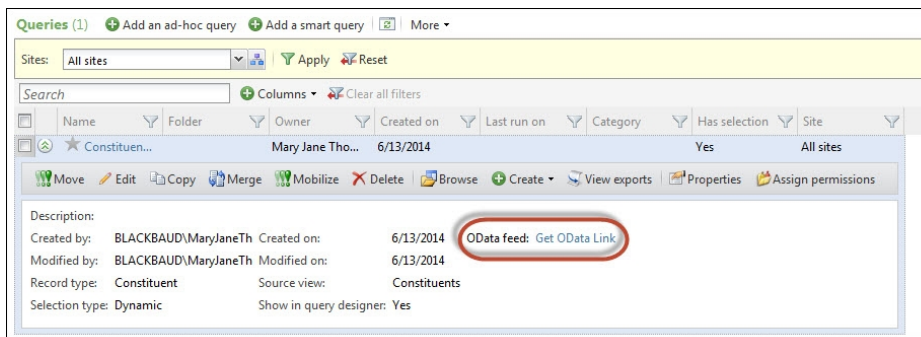
## Open Data Protocol

You can now use Open Data Protocol (OData) to consume, share, and manipulate data you query from the program.

**Show Me:** [Watch the walkthrough and related videos to learn more about OData features.](#)

OData is a data access protocol designed to provide standard access. This format can then be consumed by other programs, allowing you to further segment, manipulate, and create visual representations of the data.

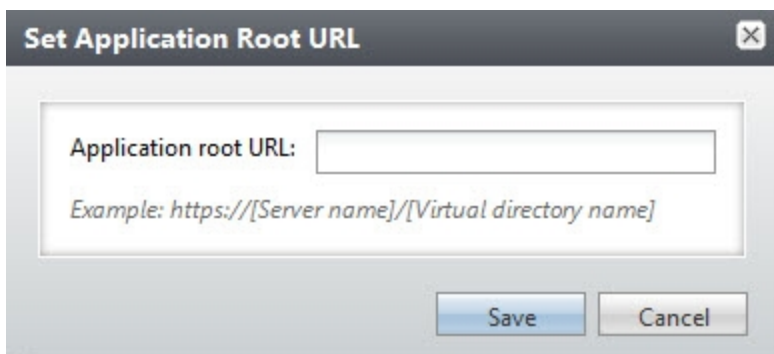
When you create a query in **Blackbaud CRM**, you can now access the data from that query in OData format. On the Information Library page, expand the query you want to use and click **Get OData Link**. Then, you can use *Microsoft Excel 2010*, *Microsoft Excel 2013*, or *Tableau* to consume that data.



You can share dashboards and charts created with OData with any user, regardless of their Blackbaud permissions. However, because users must enter their Blackbaud credentials when they consume the data, any data refreshes respect the user's security permissions.

## Set Up OData Connection

Before you can use OData, you must set your application root URL. From *Administration*, click **Set application root URL** under **Configuration**.



The root URL must be in this format: `https://[Server name]/[Virtual directory name]`. You can see your root URL on your browser address bar when you are logged into your database. The portion of your URL before `/webui` portion of the address is your root URL.

## OData in Microsoft Excel 2010

In *Microsoft Excel 2010*, you can generate pivot tables using the OData information.

**Note:** If you do not already have it, you must first install the power pivot add-in to *Excel*. From the [Microsoft Office Downloads page](#), download the add-in and install it. Most users have the 32-bit version of *Excel*, so we recommend that you download the x86 version of the add-in, unless you know that you are using a different version. If you are not sure, to see your version in *Excel*, click **File, Help**.

1. From the PowerPivot ribbon, click **PowerPivot Window**.
2. On the PowerPivot screen, click **From Data Feeds** under Get External Data.

3. In the **Friendly connection name** field, enter a descriptive name for your data feed, such as "Blackbaud CRM."
4. In the **Data feed URL** field, paste the URL you got from your query in **Blackbaud CRM**.
5. Click **Advanced**. On this screen, enter your Blackbaud CRM user name and password and click **OK**.
6. Click **Next**, and select ODataQuery.ashx as the source table.
7. Click **Finish**.
8. Once the import is complete, click **Close**. You can now manipulate and explore your data in the power pivot.

**Note:** **Blackbaud CRM** does not support *Microsoft Power Query for Excel* with OData feeds.

## OData in Microsoft Excel 2013

In *Microsoft Excel 2013*, you can create power views using the OData information.

**Note:** If this is your first time using OData in *Excel*, click **Options** and make sure you have the Power View add-in. Select "COM Add-ins." Then, select **Power View** and **Microsoft Office PowerPivot for Excel 2013** and click **OK**.

1. From the Data tab, select **From Other Sources/From OData Data Feed**.
2. Paste the URL you got from your query in **Blackbaud CRM** and enter your credentials.
3. Click **Next**.
4. Check the "ODataQuery.ashx" checkbox.
5. Click **Next**.
6. You can enter a description and change the name if you prefer.
7. Click **Finish**, and then click **OK** to import the data.
8. On the Import Data screen, select "Power View" and click **OK**. You can now use *Excel* to create charts and dashboards of your data.

**Note:** **Blackbaud CRM** does not support *Microsoft Power Query for Excel* with OData feeds.

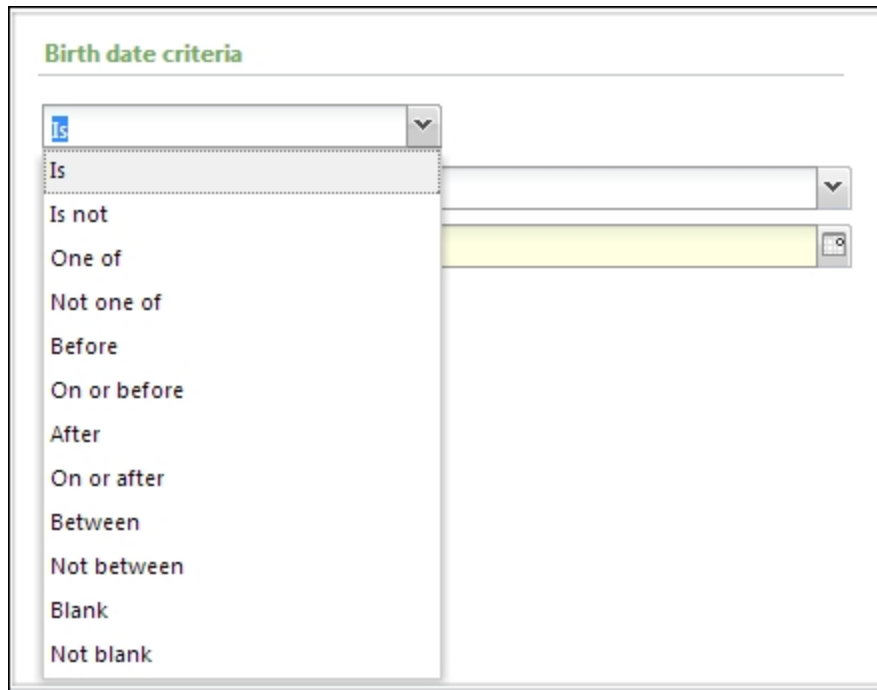
## OData in Tableau

In *Tableau*, you can create dashboard using the OData information.

1. From *Data*, click **Connect to Data**.
2. Select "OData."
3. In the **Select or enter a URL** field, paste the URL from your query.
4. On Step 2, select **Use a Username or Password** and enter your **Blackbaud CRM** credentials.
5. On Step 3, click **Connect**.
6. On Step 4, enter a name for the feed.
7. Click **OK**.

## Date Criteria Operators

In *Analysis*, the criteria operators for date field filters now include updated labels. The new terminology is easier to associate with date information than the labels that appear for other types of fields. For example, the previous "Less than" operator is now called "Before" for date fields. This enhancement reduces confusion when you select date field criteria so you can work more efficiently.



The filters are available when you create ad-hoc queries, and when you use ad-hoc queries to create user-defined data lists and smart query definitions.



Field	Output type	Filter	Filter operator
Name	Visible	<input type="checkbox"/>	
Date added	Visible	<input checked="" type="checkbox"/>	Is

Primary key field:

Record type:

Smart query name:

Description:

Help Save Cancel

After you select an operator for a date field in a user-defined smart query definition or data list, the updated label appears when you create smart query instances from the definition or include the data list on pages.

**New Smart Query**

Parameters Results Set save options

Number of times run greater than:

Last run on before:

(3) Filters

Number of times run greater than:  Last run on before:

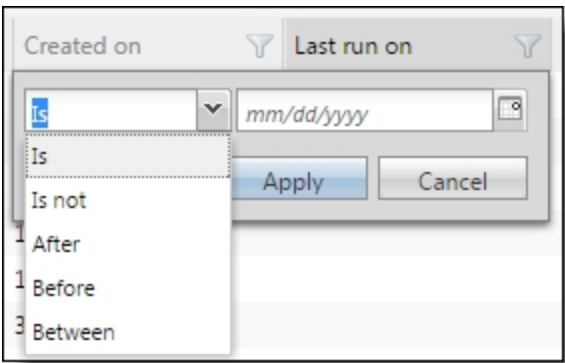
Apply Reset

Name Owner Number of times run Last run on

To update existing user-defined data lists and smart query definitions, edit and save them from the Shell Design section in **Administration, Application**.

Also, list builder column filters throughout the program and existing queries automatically include the new labels.

The new labels also appear on list builder column filters throughout the program.



The table below compares the previous operator labels to the new labels. For a complete list of date field criteria operators, refer to Criteria Operators for Date Fields in the *Query & Export Guide*.

Previous Operator Label	New Operator Label
Equal to	Is
Not equal to	Is not
Less than	Before
Less than or equal to	On or before
Greater than	After
Greater than or equal to	On or after

# New Active Users Query Source View

The new **Active Users** source view allows you to see user activity in the system. For example, you can create an active user query to see logins to the system to see which users were actively using the system on a given date, or see if there have been any logins after a specific date.

The **Active Users** source view tracks requests sent through the **Blackbaud CRM** API. These requests usually originate from the program itself, but results for queries of this type also reflect requests from associated utilities or other sources.

**Note:** Logouts are not database requests. For this query source view, a logout is defined as fifteen continuous minutes of an application user not initiating any requests.

In order to avoid performance degradation when tracking this information, the program does not track user activity for the purposes of this type of query when the performance burden on the system reaches certain thresholds. These thresholds are controlled by settings in the Health Monitoring section of the web.config file for your database.

# Revenue

## Pledge Installments

**Show Me:** [Watch this video to learn more about the new pledge installment enhancements.](#)

On the Add and Edit pledge screens we added the **Installment amount** field. In this field you enter the amount of the pledge installment. When you enter the installment amount, the number of installments is calculated for you automatically. Keep in mind, if you select a frequency of Irregular or Single installment, you cannot enter an installment amount for the pledge.

**Note:** The **Installment amount** field is also now on the Edit Posted Pledge screen.

**Edit pledge**

Constituent: Mark D. Adamson

Finder number: \_\_\_\_\_ Date: 11/22/2013

Amount: \$100,000.00 Inbound channel: \_\_\_\_\_

Opportunity: \_\_\_\_\_ Effort: \_\_\_\_\_

Source code: \_\_\_\_\_ Benefits: <none>

Appeal: \_\_\_\_\_ Reference: \_\_\_\_\_

Designation: ATHLETICS; BUILDING;... Revenue category: \_\_\_\_\_

Subtype: \_\_\_\_\_

☐ Pledge is anonymous

**Installments**

Pledge balance: \$100,000.00

Next installment date: 11/22/2013

Frequency: Annually

Installment amount: \$15,000.00

No. installments remaining: 7

Date	Amou...	Recei...	Appli...
11/22/20...	\$15,000.00	\$15,000.00	\$0.00
11/22/20...	\$15,000.00	\$15,000.00	\$0.00
11/22/20...	\$10,000.00	\$10,000.00	\$0.00

[Edit installment designations](#)

**Options**

☒ Send reminders ☐ Do not acknowledge

Post status: Not posted

Post date: 11/22/2013

Help Save Cancel

With this release we also made it much easier to add and edit pledge installments. Instead of going to multiple locations in the program to edit installment information, you can now save time by doing so from one centralized location—by clicking **Edit installment designations** on the Add or Edit pledge screens. This button also appears on the Reschedule remaining installments screen. From the Edit installment designations screen, you can change the schedule and installment amounts for each designation.

	No.	Amount	Total Designated	Not Designated	Athletics	BUILDING	LAB
Pledge amount:		\$100,000.00					
Next installment date:		11/22/2015					
Frequency:	Annually						
Installment amount:		\$15,000.00					
Pledged		\$100,000.00	\$100,000.00	\$0.00	\$25,000.00	\$50,000.00	\$25,000.00
In installments		\$100,000.00	\$100,000.00		\$25,000.00	\$50,000.00	\$25,000.00
Difference		\$0.00	\$0.00		\$0.00	\$0.00	\$0.00
Total applied		\$35,000.00			\$8,750.00	\$17,500.00	\$8,750.00
11/22/2013 1		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
Applied 1		\$15,000.00			\$3,750.00	\$7,500.00	\$3,750.00
11/22/2014 2		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
Applied 2		\$15,000.00			\$3,750.00	\$7,500.00	\$3,750.00
11/22/2015 3		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
Applied 3		\$5,000.00			\$1,250.00	\$2,500.00	\$1,250.00
11/22/2016 4		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
11/22/2017 5		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
11/22/2018 6		\$15,000.00	\$15,000.00	\$0.00	\$3,750.00	\$7,500.00	\$3,750.00
11/22/2019 7		\$10,000.00	\$10,000.00	\$0.00	\$2,500.00	\$5,000.00	\$2,500.00

On the Edit installment designations screen, the grid displays the designations for the commitment and the total amount applied to each designation. Amounts which are displayed in red or in parentheses indicate imbalances in the grid installment totals. The summary section at the top of the screen shows the amount and frequency of the pledge, in addition to the date and amount of the next installment.

At the top of the grid, the **Pledged** row shows the total pledge amount, as well as the amount designated and not designated. It also shows the amount for each designation. The **In installments** and **Difference** rows highlight if there are differences between the amount pledged and the amount designated. The rows at the top of the grid are not editable.

Below that, the installment schedule is listed with amount and designation information. You cannot change the number of installments or the installment dates, but you can change the amounts for each designation. This is helpful when you want to pay off the balance of one designation first. It is also helpful if a constituent needs to skip an installment but will make up the difference with the next installment payment. In this scenario, you can change the installment amount to zero and then add the amount to the next installment.

## Giving List Report

**Note:** Before you run this report, a system administrator must install and configure the data warehouse. The data warehouse places records from your source database in a data warehouse so you can conduct complex reporting and analysis faster and more efficiently. For information about data warehouse, refer to the *Data Warehouse and OLAP Guide*.

The Giving List is a flexible tool that allows you to view revenue and other related information in many different ways to best suit your needs.

- As a major gift officer, I want to view gifts over a certain amount from this week.
- As a campaign manager, I want to find out how much money has been raised for one or more specific campaigns (or appeals or funds) to gauge whether we are on track to meet our goals.

- My organization wants to treat commitments and payments slightly differently. For example, we want to view pledges but not pledge payments, but when it comes to event revenue, we want to view only the event registration payments and not event registrations that have yet to be paid.
- I want to view the gifts and total gift amounts brought in by each prospect manager or solicitor.

At the top of the Giving List report, a Summary section displays. You can click **Summary information** to select the information to include, such as the top performers by campaign, month, or city. Top performers can be listed by amount raised or amount received.

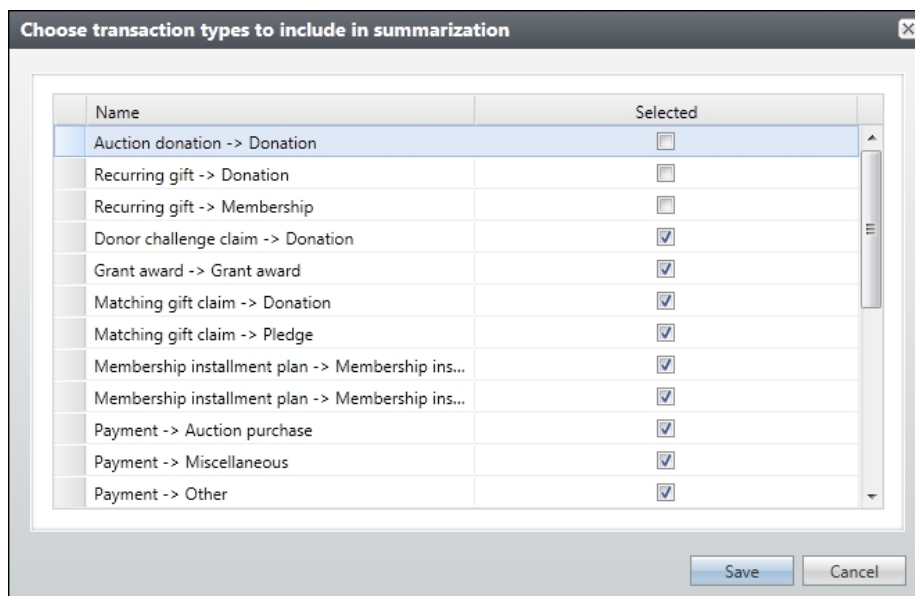
Name	Top performer amount raised	Top performer amount received	Number of
Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appeal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Designation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Postal code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transaction type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Most Generous donor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unique donors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
First time donors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Repeat donors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Average gift count	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

- **Amount raised** includes outstanding commitments even if there is no payment, such as a pledge with no pledge payments. The single, next installment of a recurring gift is included in the amount raised.
- **Amount received** includes only revenue payments received and not outstanding commitments. Only recurring gift payments, and not the next installment amounts, are included in the amount received.

**Note:** The number of unique donors, first time donors, and repeat donors includes only actual revenue and not recognition credit.

Also in the Summary section, you can click **Amount raised** and **Amount received** to configure each option to include different types of commitments and payments. Only the transaction types selected will be included in the calculations for amount raised and received, and only those transaction types will be included in the Summary section of the Giving List report. The **Amount raised** and **Amount received** calculations are usually set for your organization by your system administrator. You can still click **Amount raised** and **Amount received** to view which commitments and payments are included.



**Warning:** With the **Amount raised** and **Amount received** filters in the Summary section of the report, you select the types of commitments and payments to include in the calculations. Therefore, it is possible to select commitments (such as pledges) and payments toward the commitments (such as pledge payments) for the calculation. This essentially counts the same revenue twice. To avoid double counting the revenue, we strongly recommend you include either the commitments or the payments for the commitments, but not both.

Below the Summary section is the actual Giving List. This list includes all transactions according to the filters set on the list itself, not the settings selected in the Summary section. For example, you can filter the Giving List by constituent or date to get different views. You can add columns to have more filtering options, such as by prospect manager or inbound channel. You can also save your filter sets to reuse later. When you build your filter sets, you can click **Clear all filters** to reset the Giving List.

For more information about the list features, refer to the *General Features Guide*.

**Note:** The Giving List can be exported to *Excel*, but it only includes the grid information. The summary information does not export.

**Show Me:** [Watch this video for a high-level overview of the Giving List](#)

## Anonymous Recognition Options

With this release, you can now specify default recognition options for anonymous payments.

Previously (by default), the program did not save recognition credits on anonymous transactions. To add or edit recognition credits for anonymous transactions, you selected a revenue record and manually made changes.

To specify the new default option, from *Revenue*, click **Recognition settings** under **Configuration**. The Recognition Settings page appears. To edit the default option for anonymous payments, click **Edit** next to **Anonymous recognition options**.

**Recognition Settings**

**Donor settings** Edit | [2]

Donor recognition credit type:

**Anonymous recognition options** Edit | [2]

Never apply recognition credits for anonymous payments

**Default household recognition options** Edit | [2]

For household revenue recognize: None

For member revenue recognize: Household with

**Default relationship recognition options (0)** + Add | Filters | [2]

Constituent type	Relationship type	Recognition type
------------------	-------------------	------------------

From the Edit anonymous recognition options screen that appears, you can select to never apply or always apply recognition credits for anonymous payments. When you select **Payment is anonymous** on the Add or Edit a payment screen, or through an Enhanced Revenue Batch or Revenue Update Batch, the program uses the option you set here on the Recognition Settings page to handle recognition credits.

**Edit anonymous recognition options**

**For anonymous payments:**

☐ **Never apply recognition credits**

*When a payment is marked anonymous the constituent will not receive recognition credits. If necessary, you could manually apply recognition credits after the payment is entered.*

☒ **Always apply recognition credits**

*When a payment is marked anonymous the constituent will receive recognition credits. These recognition credits will show in recognition programs unless manually removed with a selection.*

? Help Save Cancel

## Sustained Giving

With this release, we made significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs using **Blackbaud CRM**.

**Show Me:** [Watch the walkthrough and related videos to learn more about the enhancements](#)

Enhancements related to recurring gifts include:

- A redesigned gift record that offers an at-a-glance view of the recurring gift status, installment amount, and frequency. We also refreshed the way you edit recurring gift statuses and streamlined status names and reason codes.
- A comprehensive activity timeline that captures installments, amendments, and other activity associated with the recurring gift.
- Reorganized transaction summary and detail information to improve the user experience around recurring gift activity.
- The ability to skip installments.
- Write-off improvements.
- Updates to payment methods on the Add and Edit recurring gifts screen and throughout *Sponsorship* and *Batch*.
- The new **Update recurring gift statuses** business process. Using this process, you can define rules to update multiple recurring gift statuses in the same business process.

## Recurring Gift Record Redesign

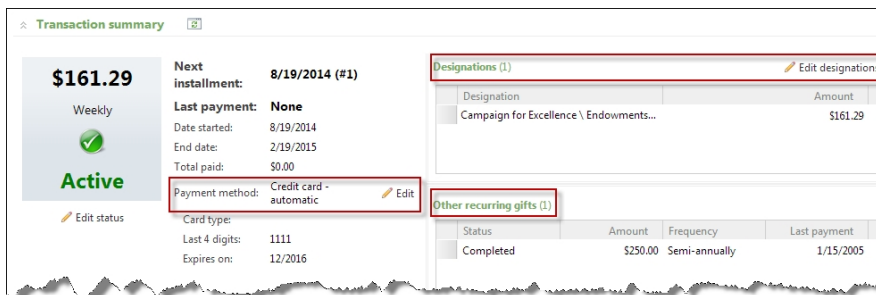
We redesigned the recurring gift record to include updated status and transaction summary information as well as a comprehensive activity timeline for installments, amendments, and other activity associated with the recurring gift. We also added the ability to skip installments and modified the installment write-off feature.

## Recurring Gift Transaction Summary Section

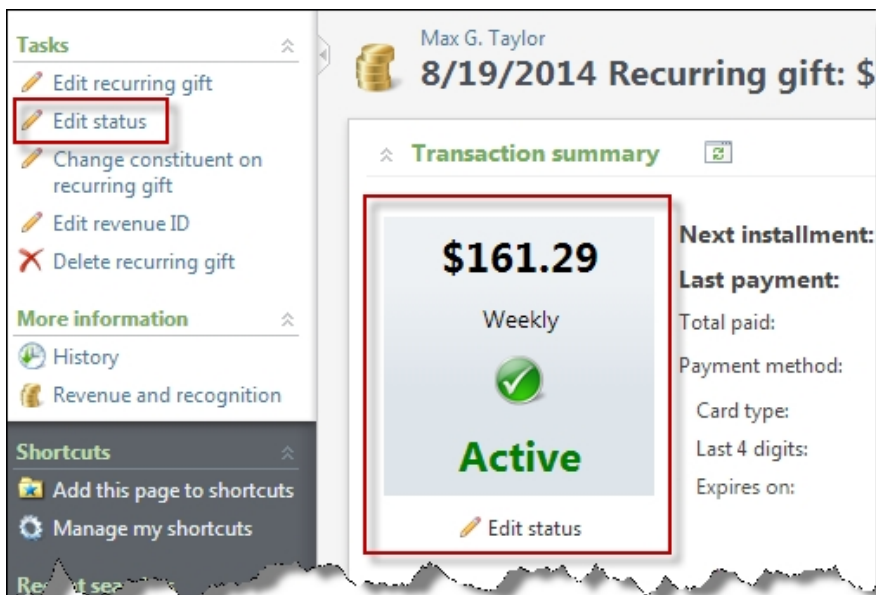
To improve the usability of the **Transaction summary** section for a recurring gift, we made the following changes:

- You can now view and edit designations directly from the **Transaction summary** section. From the action bar on the **Designations** grid, click **Edit designations**.
- You can now view payment details, and edit the payment method and associated fields. Next to a payment method, click **Edit**.
- We added the **Other recurring gifts** grid to display additional recurring gifts owned by the same constituent. From this grid, to view a recurring gift record, double-click the gift.





- We removed the **Status** section which previously displayed the **Frequency**, **Next transaction**, and **Acknowledgement** fields. We replaced this section with a new badge that includes the installment amount, frequency, and recurring gift status. To edit the status, click **Edit status** under the new icon (note that the **Edit status** link under **Tasks** on the explorer bar still remains).



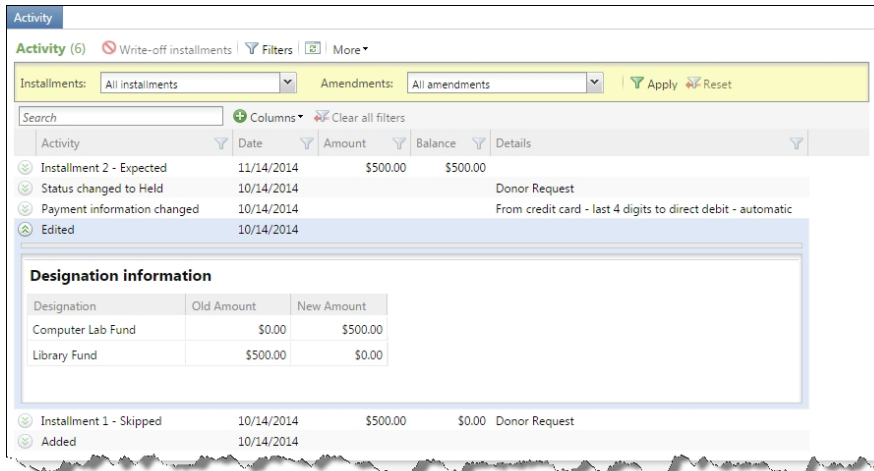
- The following fields moved from the **Transaction summary** section to the Details tab: **Batch number**, **Revenue ID**, and **Acknowledgements**.
- We removed the **Summary** section which previously displayed the **Total paid**, **Status**, and **Past due** fields.

## Recurring Gift Activity Tab

To improve the usability of the Activity tab for a recurring gift, we made the following changes:

- The Activity tab now displays as the first tab for a recurring gift and represents a comprehensive timeline of all events associated with a recurring gift. From this tab, you can view a history of payment activity associated with a transaction, manage amendments, skip installments, and write-off installments for the recurring gift.
- Under **Activity**, installments and amendments associated with the recurring gift appear and are sorted by the most recent event. Installments represent expected or completed payments spaced

at a designated frequency. Amendments represent any manual or global process change to the properties of a recurring gift. For example, when you edit the payment method of a recurring gift or change the recurring gift's status, these actions are recorded as amendments on the timeline.



- Credit card and direct debit processing for recurring gift payments are also listed on the timeline.

## Recurring Gift Details Tab

To improve the usability of the Details tab for a recurring gift, we made the following changes:

- We moved the following fields from the Details tab to the **Transaction summary** section: **Start date** (renamed to **Date started**) and **End date**.
- We moved the ability to view and edit designations and payment method information to the **Transaction summary** section.
- The Details tab now displays after the Activity tab for a recurring gift.
- The Details tab now displays the following fields: **Batch number**, **Revenue ID**, **Acknowledgements**, and **Acknowledgement date**.
- For membership recurring gifts, the Details tab now displays a link to the membership commitment, as well as the **Earned income amount** and **Contributed income amount** fields.
- For sponsorship recurring gifts, the Details tab now display a link to the sponsorship commitment.

**Tip:** Fields related to SEPA, such as **Mandate ID** and **Mandate status**, remain on the Details tab.

## Recurring Gift History Tab

We removed the History tab on the recurring gift record as historical information has been absorbed into the Activity tab timeline. For more information about the timeline, see [Recurring Gift Activity Tab on page 89](#).

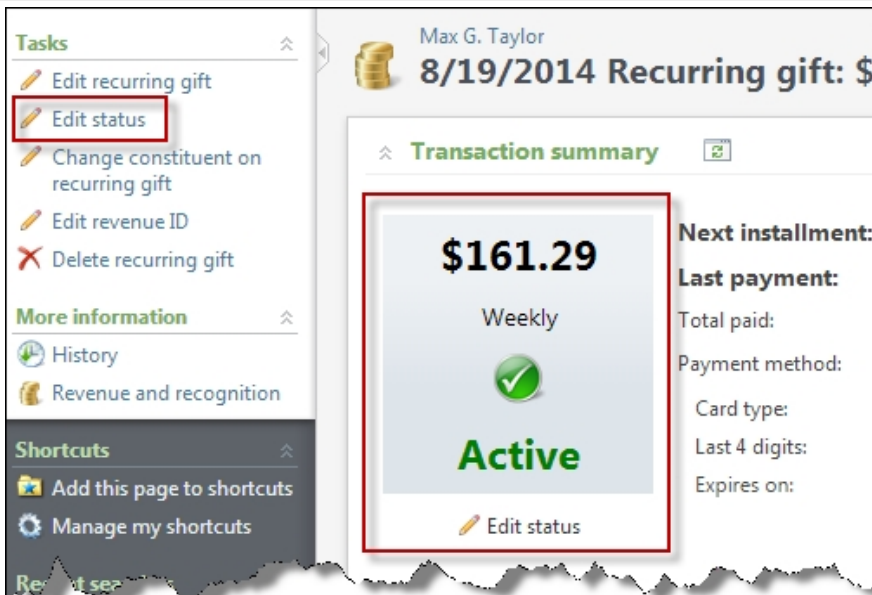
Note that the Revenue history and Constituent revenue history pages remain.

## Recurring Gift Status Changes

We refreshed the way you edit recurring gift statuses and streamlined status names and reason codes.

- To edit the status of a recurring gift, you can now click **Edit status** under the new recurring gift badge in the **Transaction summary** section (note that the **Edit status** link under **Tasks** on the explorer bar still remains). From the Edit recurring gift status screen that appears, you can select a new status and reason code.

**Tip:** When you select a "Held" status, you can enter the total number of installments to skip. For information about skipping installments, see [Skip Recurring Gift Installments on page 93](#).

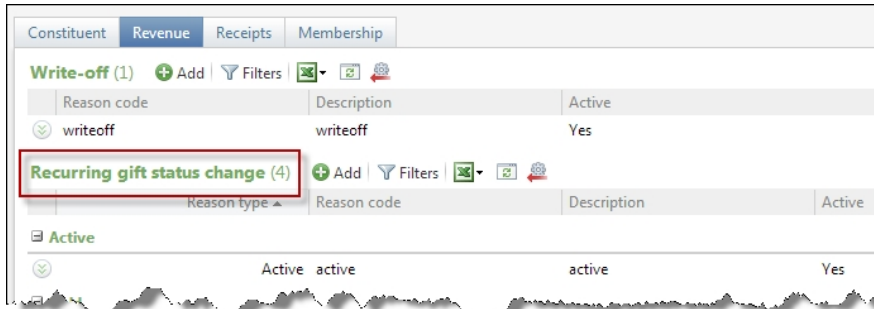


- On the Edit recurring gift status screen, we added the **Recurring gift is currently** field along with the status to easily identify the current status. You can now select a new status using the **Set new status** field and select a reason code from the new **Reason code for status change** field.

- To specify reason codes for a recurring gift status change, from the Reason Codes page in *Revenue*, we added the **Recurring gift status change** section to the Revenue tab. When you add a

reason code, you can select a status type, and enter a reason and description. The following status options are hard-coded and cannot be changed: Active, Held, Terminated, Canceled, and Lapsed.

**Note:** Any reason code you add for the "Held" status is available for skipped installments.



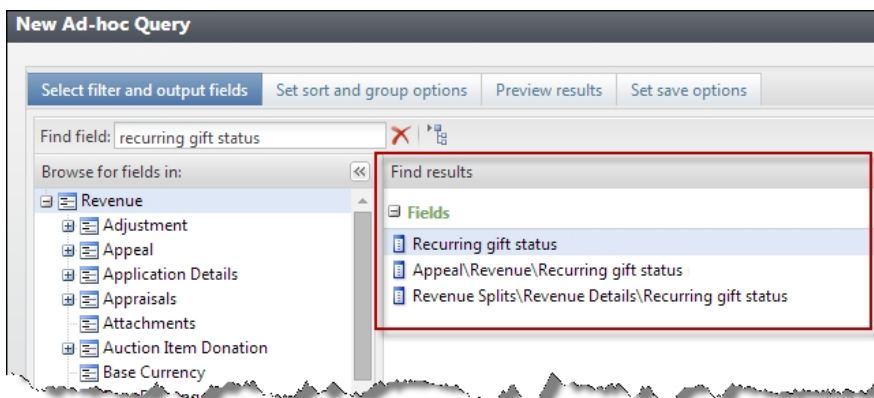
- We renamed the "Completed" status to "Canceled." Additionally, an end date is now assigned to all existing Completed/Canceled recurring gifts.

**Warning:** Now that all existing Completed/Canceled recurring gifts have an end date, new and existing queries that filter on recurring gift end date may include a larger number of results than in previous releases. After upgrading, we recommend you review all queries and reports as results may have changed.

- We added the "Lapsed" status which Indicates that a donor is not currently in good standing.

**Tip:** When a payment is applied to a recurring gift with a "Lapsed" status, the status automatically changes to "Active."

- For a Revenue query, we added the "Lapsed" and "Canceled" (formerly Completed) status options to the following filter fields: **Recurring gift status**; **Appeal\Revenue\Recurring gift status**; and **Revenue Splits\Revenue Details\Recurring gift status**. Note that existing queries will still use "Completed" while new queries will use "Canceled."



## Recurring Gift Statuses - Defined

Active, Lapsed, and Held statuses are used for open recurring gifts where payments are expected either now or in the future. Any of these status values will always have at least one expected installment either today or in the future.

- **Active** - Indicates that the donor is in good standing regarding their payments against this commitment.
- **Lapsed** - Indicates that a donor is not currently in good standing. Use the **Update recurring gift statuses** business process to define rules that identify when a recurring gift should become Lapsed. You can also manually change the status of a recurring gift to Lapsed.
- **Held** - Indicates that the next installment, either today or in the future, has been skipped, but payments are expected to resume again in the future (based on the date of the next expected installment).

Canceled and Terminated statuses are used for recurring gifts against which the donor no longer plans to make payments.

- **Canceled** - Indicates that the donor made a request to stop payments.

When a donor requests to end a commitment on a future date, that date can be specified in the recurring gift's **End date** field. The **Update recurring gift statuses** business process automatically updates recurring gifts to Canceled when the **End date** has passed.

You can also immediately change a recurring gift to Canceled by editing the recurring gift status. When you make this change, the current date will be set as the **End date** of the recurring gift.

**Warning:** All existing Completed/Canceled recurring gifts now have an end date. Note that new and existing queries that filter on recurring gift end date may include a larger number of results than in previous releases. After upgrading, we recommend you review all queries and reports as results may have changed.

- **Terminated** - Indicates that the donor stopped making payments. The donor is considered delinquent in regards to this commitment. Use the **Update recurring gift statuses** business process to define rules that identify when a recurring gift should become Terminated. You can also manually change the status of a recurring gift to Terminated.

## Recurring Gift Installment Generation

As a reminder, the program creates installments during the following scenarios:

- When a payment is applied to a recurring gift and the latest installment has a date prior to the date of the payment.
- When a write-off is applied to a recurring gift, and the latest installment has a date prior to the date of the payment.
- When an expected installment is skipped and no other expected installment exists.
- When a recurring gift has a "Held" status for a length of one or more installments.

## Skip Recurring Gift Installments

From the Activity tab, you can now skip any expected installment as long as the installment date is no more than five days prior to the current date. To skip an installment, click the double arrows next to an installment to expand its row. From the action bar that appears, click **Skip installment**.

Activity (2) Write-off installments Filters Columns Clear all filters

Search

Date	Activity	Amount
8/12/2014	Installment 1 - Expected	
9/12/2014	Installment 2 - Expected	

Skip installment

Date	Activity	Amount
9/12/2014	Expected	

From the Skip installment screen, you can enter the number of installments to skip and specify a reason code for the skip.

**Skip installment**

Installment 30 (5/29/2014) is currently: **Expected**

Current balance on this installment: \$22.00

*Skipping installment(s) will set the balance(s) to 0 and change the recurring gift status to Held*

Total numbers of installments to skip:

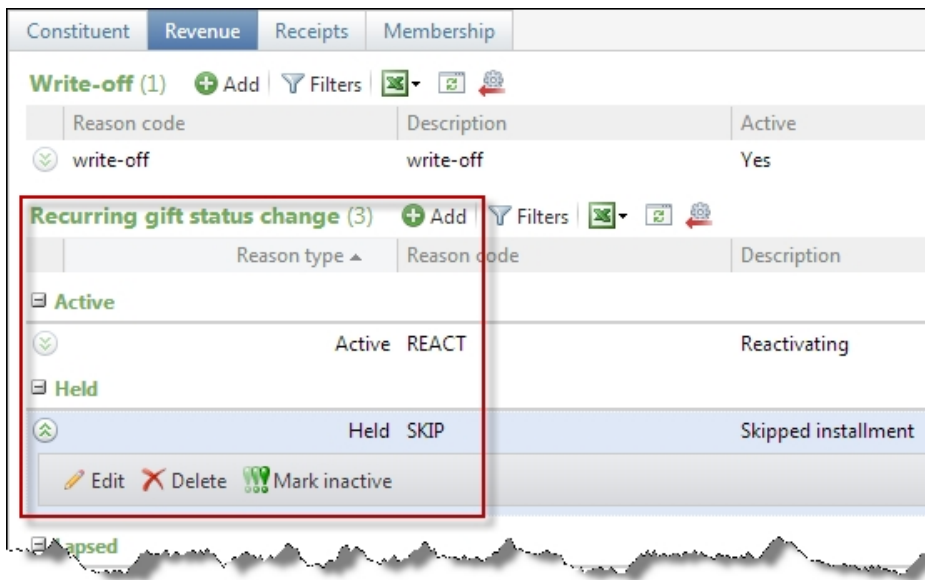
Choose a reason code for skip:

*(Recurring gifts can skip a maximum of 12 consecutive installments)*

Date	Activity
7/29/2014	Installment 32 - Expected
6/29/2014	Installment 31 - Skipped
5/29/2014	Installment 30 - Skipped
4/29/2014	Installment 29 - Past due

Help Save Cancel

You specify reason codes for skipped installments from the Reason Codes page in *Revenue*. On the Revenue tab, under **Recurring gift status change**, any reason code you configure for the "Held" status is available for skipped installments.

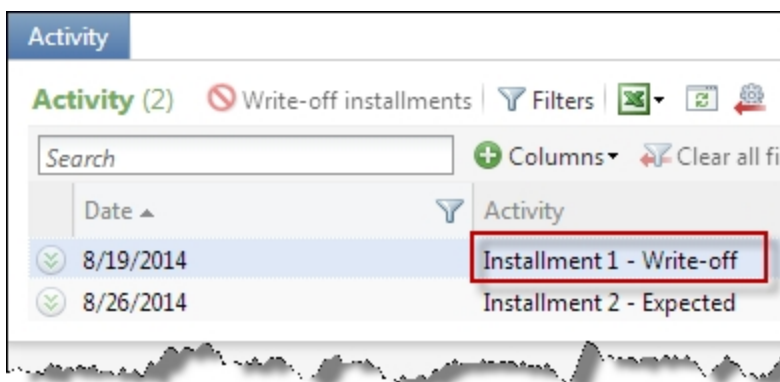


**Tip:** In a Revenue query, the **Recurring Gift Write-offs** node now includes a **Type** field where you can specify "Write-off" or "Skip."

## Write-Off Recurring Gift Installments

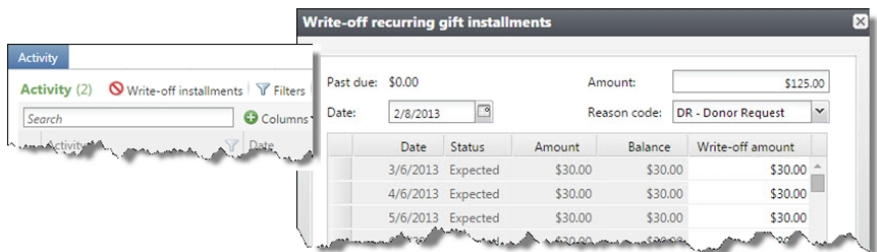
On the Activity tab of a recurring gift record, we made the following enhancements to the installment write-off functionality:

- We removed the **Write-offs** section. Installment write-offs are now tracked on the activity timeline and display as "Installment # – Write-off."

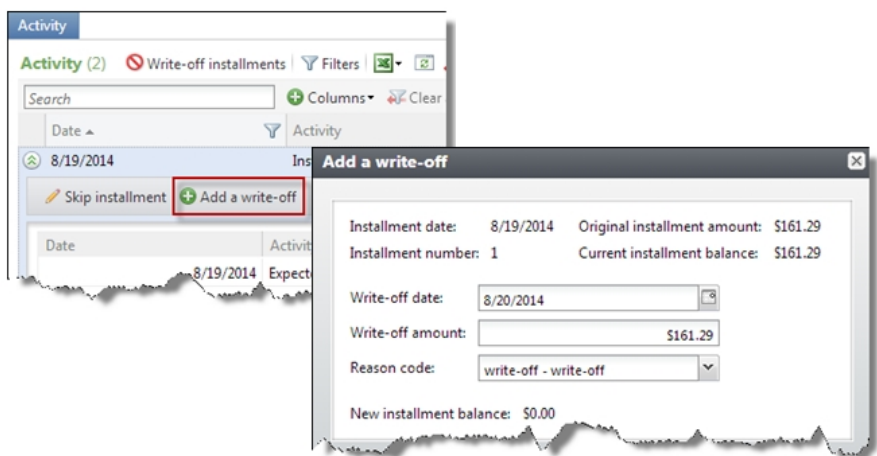


- To write off one or multiple installments, on the action bar, click **Write-off installments**. The Write-off recurring gift installments screen displays all installments eligible for a partial or full write-off. You can enter a write-off date and the amount to write off, and select a reason code.

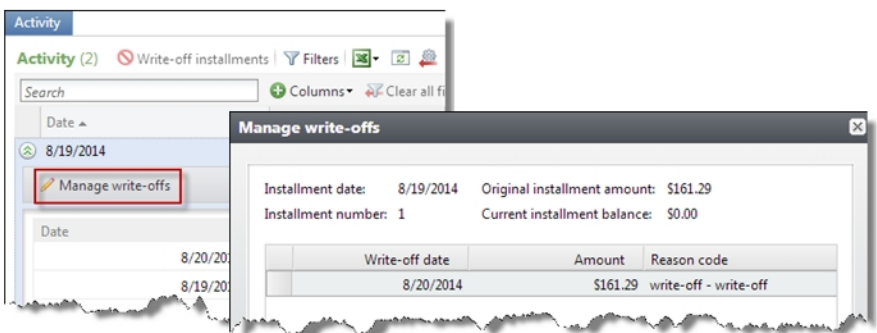




- You can also write off an individual installment from an installment row in the activity timeline. Click the double arrows next to an installment to expand its row. From the action bar that appears, click **Add a write-off**. From the Add a write-off screen, enter a write-off date and amount, and select a reason code.



- To edit and delete one or multiple write-offs from an installment row in the activity timeline, click the double arrows next to a written off installment to expand its row. From the action bar that appears, click **Manage write-offs**. From the Manage write-offs screen, edit the write-off date, amount, and reason code for all written off installments.



**Tip:** In a Revenue query, the **Recurring Gift Write-offs** node now includes a **Type** field where you can specify "Write-off" or "Skip."

## Add and Edit a Recurring Gift Record

On the Add a recurring gift and Edit a recurring gift screens, we made the following field changes:



- **Designation** is now **Designations** (Edit screen only).
- **Recurring gift is anonymous** is now **Make this recurring gift anonymous**.
- **Frequency** is now **Installment frequency**.
- **Starting on** is now **Installment schedule begins**.
- **Next transaction** is now **Next installment date**.
- **Ending on** is now **End date (optional)**. The recurring gift ends on this date (no installments are generated after this date). The Update recurring gift statuses business process can automatically change the gift's status to "Canceled" after this date expires.

**Designations** Campaign for Excellence Revenue category:   
 Revenue function:   
☒ Make this recurring gift anonymous

**Schedule**

Installment frequency: Weekly   
 Installment schedule begins: 8/19/2014   
 Next installment date: 8/26/2014   
 End date (optional): 2/19/2015   
☒ Send reminders   
☐ Do not acknowledge

Date	Amount
8/26/2014	\$161.29
9/2/2014	\$161.29
9/9/2014	\$161.29
9/16/2014	\$161.29
9/23/2014	\$161.29

On the Add a recurring gift screen, the **Pay installments automatically by** checkbox is now **Payment method**. The following options have been changed or added:

- "Credit card" is now "Credit card – pay installments automatically"
- "Direct debit" is now "Direct debit – pay installments automatically"
- We added "Credit card – store last 4 digits for reference." This option is used for reporting and reconciling, and is not used to process payments. We added this to accommodate recurring gifts in **Luminate Online** that need to be reflected in **Blackbaud CRM**.
- We added "Other." When you select this option, the **Other method** field appears where you can select a different payment method. We included this option to better accommodate international payments and in preparation for future international features.
- **Tip:** In *Administration*, your system administrator configures the payment methods available for a payment in the form of "Other." If the method you want does not appear, consult your system administrator.
- We added "None." When you select this option, you signify that the payment method is unknown. This is the equivalent of deselecting the **Pay installments automatically by** checkbox in previous

versions.

**Schedule**

Installment frequency: Monthly

Installment schedule begins: 8/7/2014

End date (optional):

**Payment information**

Payment method: Credit card - pay installments automatically

Card type: Credit card - pay installments automatically

Card number: Credit card - store last 4 digits for reference

Direct debit - pay installments automatically

Other

None

**Special instructions**

☒ Send reminders

☐ Do not acknowledge

## Sponsorships

We made field and option changes for the Add, transfer, and reassign sponsorship screens as well as the Add a recurring additional gift screen:

- **Frequency** is now **Installment frequency**.
- **Starting on** is now **Installment schedule begins**. The installment schedule begins on this date. The dates of subsequent installments are calculated based on this date and the frequency of the payment.
- **Ending on** is now **End date (optional)**.

The **Pay installments automatically by** checkbox is now **Payment method**. The following options have been changed or added:

- "Credit card" is now "Credit card – pay installments automatically"
- "Direct debit" is now "Direct debit – pay installments automatically"
- We added "Credit card – store last 4 digits for reference." This option is used for reporting and reconciling, and is not used to process payments. We added this to accommodate recurring gifts in **Luminate Online** that needed to be reflected in **Blackbaud CRM**.
- We added "Other." When you select this option, the **Other method** field appears where you can select a different payment method. We included this option to better accommodate international

payments and in preparation for future international features.

- **Tip:** In *Administration*, your system administrator configures the payment methods available for a payment in the form of "Other." If the method you want does not appear, consult your system administrator.
- We added "None." When you select this option, you signify that the payment method is unknown. This is the equivalent of deselecting the **Pay installments automatically by** checkbox in previous versions.

**Schedule**

Installment frequency: Monthly

Installment schedule begins: 8/7/2014

End date (optional):

**Payment information**

Payment method: Credit card - pay installments automatically

Card type: Credit card - pay installments automatically

Card number: Credit card - store last 4 digits for reference

Direct debit - pay installments automatically

Other

None

**Special instructions**

☒ Send reminders

☐ Do not acknowledge

## Batch

For Revenue Update Batch, Enhanced Revenue Batch, and Sponsor Batch, we added "Credit card - store last 4 digits for reference," however, "Credit card" and "Direct debit" remain unchanged.

For details about the payment method field and option changes, see [Add and Edit a Recurring Gift Record on page 96](#) and [Sponsorships on page 98](#).

## Update Recurring Gift Statuses Business Process

With this release, we created the **Update recurring gift statuses** business process. Using this process, you can define rules to update multiple statuses in the same business process. You select to include specific payment methods, identify frequencies, and define rules for how the program handles recurring gift statuses during the update process. For example, you can create a rule to update installments to "Past due" when they have an unpaid balance 30 days past the installment date.

**Note:** Only users in these roles can access the **Update recurring gift statuses** business process: Annual Fund Manager and Director of Development.

**Warning:** With this release, the **Update recurring gift statuses** business process will not update recurring gift statuses for sponsorships; however, the process does include sponsorships in order to update installments to "Past due."

**Show Me:** [Watch the walkthrough and related videos to learn more about the enhancements](#)

### ➤ Does the "Set recurring gift status" global change still exist?

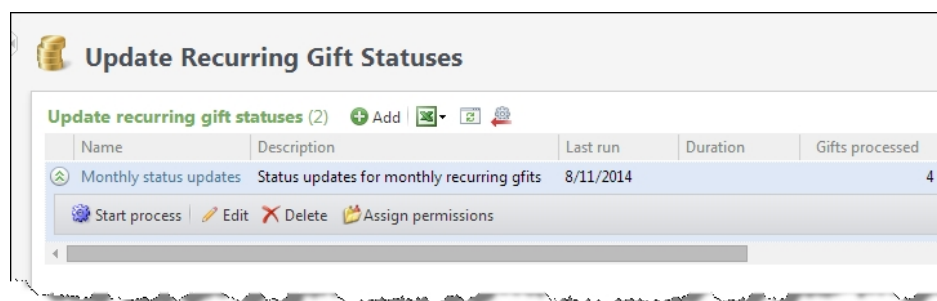
Yes. This global change remains available (through *Administration*). While this global change is still available and also allows you to update statuses in bulk, the new business process gathers all necessary functionality in a single place and by using a set of rules, ensures that the correct records are updated.

It is important to note that we removed the ability to set recurring gifts to "Held" using the global change. This affects any new global change instances you create. For existing global change instances, a message appears informing you that setting recurring gifts to "Held" is not supported. For more information about recurring gifts marked as "Held" prior to this release, see [Existing "Held" Recurring Gifts on page 103](#).

The following sections include information about all areas we improved to support the new **Update recurring gift statuses** business process.

## Update Recurring Gift Statuses Page

On the Revenue page, click **Update recurring gift statuses** to access the Update Recurring Gift Statuses page. From here, you can add, edit, and start your update processes.



Click the name of a business process to access its status page, which includes Recent Status, History, and Job Schedules tabs.

**Tip:** From the History tab of a process status page, to view additional details about the process, you can click the double arrows next to a process status to expand its row. From the action bar that appears, click **View status page** to view a detailed breakdown of process outcomes.

## Add a Recurring Gift Status Update Process

On the Add a recurring gift status update process screen, you can select to update recurring gifts that meet specific criteria, define rules for statuses, and preview updates prior to running the process.

- On the General tab, specify a payment method and frequency, or update recurring gifts based on a selection. It is important to note the following payment method options:

**Add a recurring gift status update process**

General Rules Preview

Name: Monthly status updates

Description: Status updates for monthly recurring gifts

**Which recurring gifts do you want this process to update?**

☒ Update recurring gifts that meet these criteria:

**Payment methods:**

- ☒ Credit card - pay installments automatically
- ☒ Credit card - store last 4 digits for reference
- ☒ Debit card - pay installments automatically
- ☒ Other
- ☒ None

**Frequencies:**

- ☒ Weekly
- ☒ Biweekly
- ☒ Semi-monthly
- ☒ Monthly
- ☒ Bimonthly
- ☒ Quarterly
- ☒ Semi-annually
- ☒ Annually

☐ Update recurring gifts in this selection:

**Credit card - pay installments automatically** - Select this option to include all recurring gifts with a payment method of "Credit card - pay installments automatically."

**Credit card - store last 4 digits for reference** - Select this option to include all recurring gifts with a payment method of "Credit card - store last 4 digits for reference." This payment method is for reporting and reconciling, and is not used to process payments.

**Direct debit - pay installments automatically** - Select this option to include all recurring gifts with a payment method of "Debit card - pay installments automatically."

**Other** - Select this option and specify another form of payment method.

**None** - Select this option when the payment method is unknown.

- On the Rules tab, define rules for when the program will update recurring gifts to "Lapsed" or "Terminated," and when the program will update "Expected" recurring gift installments to "Past due."

**Add a recurring gift status update process**

General Rules Preview

**Mark installments as Past Due**

☒ Change unpaid installments to PAST DUE

- ☒ Installments are PAST DUE when they have an unpaid balance  days past the installment date
- ☐ Installments are PAST DUE when the date of the NEXT installment is on or before the date this process runs

**Change gifts to LAPSED**

☒ Change ACTIVE recurring gifts to LAPSED

- ☒ Recurring gifts are LAPSED when they have  PAST DUE installment(s)
- ☐ Recurring gifts are LAPSED when an installment has an unpaid balance  days past the installment date

**Tips** Automatic credit card and direct debit payments will continue to be generated for Lapsed recurring gifts. Lapsed recurring gifts will automatically change to Active when payments or write-offs are applied to them.

**Change gifts to TERMINATED**

☒ Change LAPSED recurring gifts to TERMINATED

- ☒ Recurring gifts are TERMINATED when they have  PAST DUE installment(s)
- ☐ Recurring gifts are TERMINATED when an installment has an unpaid balance  days past the installment date

**Warning:** To ensure past due amounts display in the program, you must create a recurring gift status update business process and define a rule for "Past due." The program uses this rule to update unpaid installments to "Past due." These "Past due" installments are then reflected in the recurring gift's past due amount. For more information about past due amount calculations, see [Past Due Amount Calculations on page 103](#).

- On the Preview tab, you can review the rules you defined on the Rules tab as well as hard-coded rules the program respects during the update process.

For example, this process updates recurring gifts to "Canceled" when their end date has passed. This process also updates "Held" recurring gifts to "Active" when skipped installments are in the past.

**Add a recurring gift status update process**

General Rules Preview

This process will make the changes shown here to these recurring gifts:

- ☒ Credit card - pay installments automatically
- ☒ Credit card - store last 4 digits for reference
- ☒ Direct debit - pay installments automatically
- ☒ Other
- ☒ None
- ☒ Weekly
- ☒ Biweekly
- ☒ Semi-monthly
- ☒ Monthly
- ☒ Bi-monthly
- ☒ Quarterly
- ☒ Semi-annually
- ☒ Annually

Note: status changes can always be performed manually, outside of this automatic process.

Installments		
Active	Lapsed	Installments are Past due when they have an unpaid balance after 30 days. This process will schedule new installments even when previous installments are unpaid.
Lapsed	Terminated	Active recurring gifts become Lapsed if 2 installments are Past due
Active	Canceled	Lapsed recurring gifts become Terminated if 3 installments are Past due
Held	Canceled	Active recurring gifts become Canceled if their 'End date' is expired
Lapsed	Canceled	Held recurring gifts become Canceled if their 'End date' is expired
Held	Active	Lapsed recurring gifts become Canceled if their 'End date' is expired
Held	Active	Held recurring gifts become Active when the dates on all Skipped installments are in the past

Help Save Cancel

## Past Due Amount Calculations

We made changes to the way past due amounts are calculated throughout the program.

To ensure non-zero past due amounts display in the program, you must create a recurring gift status update business process and define a rule for "Past due." The program uses this rule to update unpaid installments to "Past due." All "Past due" installments are then reflected in the recurring gift's past due amount. We recommend you run the business process on a consistent schedule.

Previously, a recurring gift's past due amount was calculated as the sum of installment balances with dates in the past. With this release, past due amounts are now calculated as the sum of installment balances with a status of "Past due." To update installments to "Past due," you must run the recurring gift status update business process. For more information about this business process, see [Update Recurring Gift Statuses Business Process on page 99](#).

**Note:** Sponsorship areas were also updated to reflect the new calculations, including the Sponsorship Past Due report as well as the **Past due**, **Total past due**, and **Carry forward** fields throughout *Sponsorship*. Additionally, the Sponsorship delinquency smart query now only returns records for "Past due" installments.

If your organization must model past due amount calculations from previous versions, we recommend you run the recurring gift status update business process daily using the following criteria:

1. On the General tab, leave all default options selected.
2. On the Rules tab, select **Change unpaid installments to Past due**. Then select **Installments are Past due when they have an unpaid balance "1" day past the installment date**. Ensure you enter "1" day.
3. Clear the **Change Active recurring gifts to Lapsed** and **Change Lapsed recurring gifts to Terminated** options.

## Existing "Held" Recurring Gifts

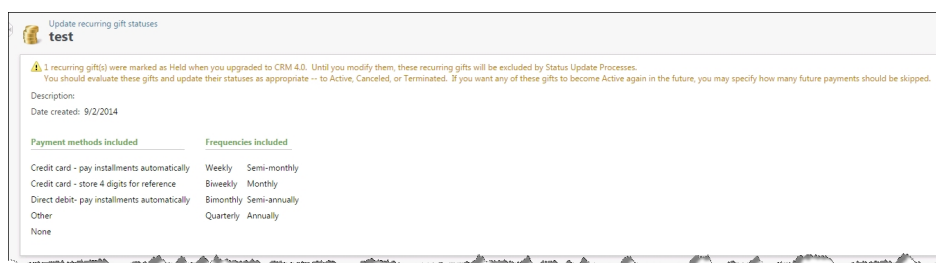
Prior to version 4.0, recurring gifts with a "Held" status remained "Held" until you reactivated them. In version 4.0, "Held" recurring gifts must be associated with one or more skipped installments, and the **Update recurring gift statuses** business process can be used to automatically reactivate "Held" recurring gifts at the appropriate time. The business process excludes any recurring gifts that were "Held" prior to version 4.0 in order to prevent them from being reactivated (since they are not associated with any skipped installments).

When you run the business process, a message appears and indicates the number of "Held" recurring gifts that existed prior to version 4.0. In order to be included in the business process, we recommend you review these gifts and update their statuses as appropriate.

**Tip:** Use the "Legacy Held Recurring Gifts" selection to locate "Held" recurring gifts that existed prior to version 4.0.

For more information about recurring gift statuses, see [Recurring Gift Statuses - Defined on page 92](#). For more information about skipping installments, see [Skip Recurring Gift Installments on page 93](#). For more information about the **Update recurring gift statuses** business process, see [Update Recurring Gift Statuses Business Process on page 99](#).





## Batch Lockdown for Credit Card Processing

When you run a Credit card processing process, we now lock the batch while the cards are being processed so that a user cannot change information about a transaction that has already been sent to the **Blackbaud Payment Service**. After the cards are processed, the batch is unlocked. Previously, the batch was not locked and payment information could be changed while the cards were processed which could cause a mismatch between the transaction information in **CRM** and in the **Blackbaud Payment Service**.

## Treasury

### Credit Card Reconciliation

To promote a more efficient workflow and reduce the amount of time it takes to reconcile your credit card activity, we enhanced the credit card reconciliation process. You can now identify and work with all reconciliation items from the new Reconcile transactions and disbursements page in *Treasury*.

In addition, to more closely align the program with the way your organization works with credit card reconciliation, we replaced all references of "settle" and "settlement" with "reconcile" and "reconciliation" throughout *Treasury*. These terminology changes apply to the Treasury page, screen details, links, field names, and tooltips as they relate to credit card reconciliation.

The following sections include details about the new Reconcile transactions and disbursements page as well as status and reconciliation considerations we recommend you review.

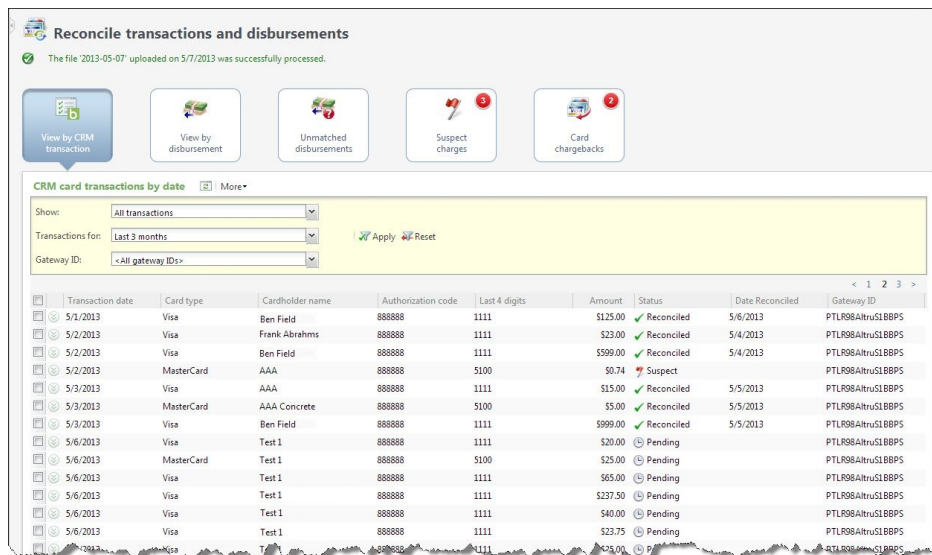
**Show Me:** [Review the walkthrough to learn more](#)

**Show Me:** [Review the video to learn more](#)

### Reconcile Transactions and Disbursements Page

On the Treasury page, click **Reconcile transactions and disbursements** (formerly **Outstanding credit card transactions**) to access the new Reconcile transactions and disbursements page so you can reconcile credit card transactions based on your disbursement report and transaction activity.





From the Reconcile transactions and disbursements page, under **Tasks**, you can reconcile transactions using an automated process or a manual upload. Click **Enable BBMS auto reconcile** (formerly **Enable BBMS auto settle**) to enable the automated process only available with **Blackbaud Merchant Services**. Alternatively, you can click **Upload disbursement report** (formerly **Upload settlement report**) to manually upload a disbursement report. When you upload the report and select a report format, the program searches for and compares the credit card transactions in the report with transactions in your database.

**Note:** You can also upload a disbursement report from the Treasury page. Under **Credit card reconciliation**, click **Upload disbursement report**.

The Reconcile transactions and disbursements page is organized into five tabs, giving you the ability to view reconciliation details by transaction or disbursement. You can also work with unmatched disbursements as well as suspect and chargeback transactions processed through **Blackbaud Merchant Services**.

## View Reconciliation Details by Transaction

On the View by transaction tab, you can view all or specific credit card transactions entered into the database during a selected time period.

Use the **Show** field to specify transactions such as Reconciled or Pending. In the **Transactions for** field, select the date range of the transactions to view, such as Today or This month. Use the **Gateway ID** field to display transactions associated with a specific gateway ID or all gateway IDs.

From this tab, you can manually mark transactions as Reconciled or Pending, and view transaction details. For transactions processed through **Blackbaud Merchant Services**, you can also approve or refund suspect transactions, and view gateway details.

**Reconcile transactions and disbursements**

The file '2013-05-07' uploaded on 5/7/2013 was successfully processed.

View by CRM transaction | View by disbursement | Unmatched disbursements | Suspect charges | Card chargebacks

**CRM card transactions by date** [5] More

Show: All transactions  
Transactions for: Last 3 months  
Gateway ID: <All gateway IDs>

Apply Reset

Transaction date	Card type	Cardholder name	Authorization code	Last 4 digits	Amount	Status	Date Reconciled	Gateway ID
5/1/2013	Visa	Ben Field	888888	1111	\$125.00	Reconciled	5/6/2013	PTLR98AltruS1BBPS
5/2/2013	Visa	Frank Abrahms	888888	1111	\$23.00	Reconciled	5/4/2013	PTLR98AltruS1BBPS
5/2/2013	Visa	Ben Field	888888	1111	\$599.00	Reconciled	5/4/2013	PTLR98AltruS1BBPS
5/2/2013	MasterCard	AAA	888888	5100	\$0.74	Suspect		PTLR98AltruS1BBPS
5/3/2013	Visa	AAA	888888	1111	\$15.00	Reconciled	5/5/2013	PTLR98AltruS1BBPS
5/3/2013	MasterCard	AAA Concrete	888888	5100	\$5.00	Reconciled	5/5/2013	PTLR98AltruS1BBPS
5/3/2013	Visa	Ben Field	888888	1111	\$999.00	Reconciled	5/5/2013	PTLR98AltruS1BBPS
5/6/2013	Visa	Test 1	888888	1111	\$20.00	Pending		PTLR98AltruS1BBPS
5/6/2013	MasterCard	Test 1	888888	5100	\$25.00	Pending		PTLR98AltruS1BBPS
5/6/2013	Visa	Test 1	888888	1111	\$65.00	Pending		PTLR98AltruS1BBPS
5/6/2013	Visa	Test 1	888888	1111	\$237.50	Pending		PTLR98AltruS1BBPS
5/6/2013	Visa	Test 1	888888	1111	\$40.00	Pending		PTLR98AltruS1BBPS
5/6/2013	Visa	Test 1	888888	1111	\$23.75	Pending		PTLR98AltruS1BBPS

## View Transactions by Disbursement

On the View by disbursement tab, you can view all or specific credit card transactions entered into the database during a selected time period, grouped by merchant disbursement date. Use the **Disbursements for** and **Gateway ID** filters to further narrow your results.

After you upload a disbursement report, reconciled and unmatched transactions display on this tab as well as any transactions held as pending, disputed, resolved, or refunded due to a chargeback request from the cardholder. Fraud fee transactions signify a credit card processing fee associated with the **Fraud Management** service offered through **Blackbaud Merchant Services**.

For transactions processed through **Blackbaud Merchant Services**, click **BBMS Report** next to a disbursement date header to access the **Blackbaud Merchant Services** Disbursement Detail Report. Previously, you could only access this report through the **Blackbaud Merchant Services** web portal.

You can also view gateway details for automatically reconciled transactions processed through **Blackbaud Merchant Services**.

**Reconcile transactions and disbursements**

The file '2013-05-07' uploaded on 5/7/2013 was successfully processed.

View by CRM transaction | View by disbursement | Unmatched disbursements | Suspect charges | Card chargebacks

**Merchant disbursements by date and gateway** (55) [5] More

Disbursements for: Last 3 months  
Gateway ID: <All gateway IDs>

Apply Reset

Disbursement date	Transaction date	Card type	Cardholder name	Gross amount	Fee	Net amount	Status	Gateway ID
4/17/2013	BBMS Report			\$257.00	(\$7.73)	\$249.27	Unmatched	PTLR98AltruS1BBPS
4/18/2013	BBMS Report			\$0.00	(\$12.06)	(\$12.06)	Unmatched	PTLR98AltruS1BBPS
4/18/2013	BBMS Report			\$472.33	(\$35.86)	\$436.47		PTLR98AltruS1BBPS
4/18/2013	4/18/2013	Visa	Test 1	\$250.00	(\$6.76)	\$243.24	Chargeback disputed	PTLR98AltruS1BBPS
4/18/2013	4/18/2013	Visa	Test 1	\$150.00	(\$4.16)	\$145.84	Chargeback resolved	PTLR98AltruS1BBPS
4/18/2013	4/18/2013	Visa	Test 1	(\$150.00)	(\$18.90)	(\$168.90)	Reconciled	PTLR98AltruS1BBPS
4/18/2013	4/18/2013	Visa	Test 1	\$222.33	(\$6.04)	\$216.29	Chargeback resolved	PTLR98AltruS1BBPS
4/19/2013	BBMS Report			\$150.00	(\$4.16)	\$145.84	Unmatched	PTLR98AltruS1BBPS
4/22/2013	BBMS Report			\$9.00	(\$1.47)	\$7.53		PTLR98AltruS1BBPS
4/22/2013	4/22/2013	Visa	Test 1	\$9.00	(\$0.49)	\$8.51	Unmatched	PTLR98AltruS1BBPS
4/22/2013	4/22/2013	Visa	Test 1	(\$9.00)	(\$0.49)	(\$9.49)	Reconciled	PTLR98AltruS1BBPS
4/22/2013	4/22/2013	Visa	Test 1	\$9.00	(\$0.49)	\$8.51	Reconciled	PTLR98AltruS1BBPS
4/22/2013	BBMS Report			\$0.00	(\$16.42)	(\$16.42)		PTLR98AltruS1BBPS
4/22/2013	4/22/2013	Visa	Test 1	\$22.22	(\$0.84)	\$21.38	Chargeback resolved	PTLR98AltruS1BBPS
4/22/2013	4/22/2013	Visa	Test 1	(\$22.22)	(\$14.58)	(\$37.80)	Unmatched	PTLR98AltruS1BBPS

**Note:** Transaction details are only available for transactions settled with this release or higher. Previously settled and unmatched transactions do not display transaction details.

## View Unmatched Disbursements

On the Unmatched disbursements tab, after you upload a disbursement report, you can view any transactions in the report that do not match corresponding transactions in your database, such as a transaction submitted to a payment processor from outside the program.

In the **Transactions for** field, select the date range of the transactions to view, such as This month or This Quarter. Use the **Gateway ID** field to further narrow your results.

**Reconcile transactions and disbursements**  
 The file '2013-05-07' uploaded on 5/7/2013 was successfully processed.

View by CRM transaction | View by disbursement | **Unmatched disbursements** | Suspect charges | Card chargebacks

Disbursements received and not matched (17) More

Transactions for: Last 3 months Gateway ID: <All gateway IDs> Apply Reset

Transaction date	Card type	Cardholder name	Authorization code	Last 4 digits	Amount	Uploaded by	Upload date	Gateway ID
4/2/2013	Visa	Test 123	888888	1111	\$1.00	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 1	888888	5100	\$9.00	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 1	888888	1111	(\$9.00)	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 1	888888	1111	\$9.00	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS

Remove from list Find transaction match

4/2/2013	Visa	Test 1		1111	(\$9.00)	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 123	888888	1111	\$9.00	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 123		1111	(\$9.00)	Blackbaud Built-In A...	4/10/2013	PTLR98AtrnS1BBPS
4/2/2013	Visa	Test 1	888888	1111	\$0.50	Blackbaud Built-In A...	5/4/2013	PTLR98AtrnS1BBPS
4/12/2013	Visa	Test 123		1111	(\$150.00)	Blackbaud Built-In A...	4/16/2013	PTLR98AtrnS1BBPS
4/17/2013	Visa	Den Black	888888	5100	\$1.00	Blackbaud Built-In A...	4/21/2013	PTLR98AtrnS1BBPS
4/17/2013	Visa	Test	888888	1111	\$6.00	Blackbaud Built-In A...	4/21/2013	PTLR98AtrnS1BBPS
4/17/2013	Visa	Den Black	888888	5100	\$150.00	Blackbaud Built-In A...	4/21/2013	PTLR98AtrnS1BBPS
4/17/2013	Visa	Test 1	888888	1111	\$100.00	Blackbaud Built-In A...	4/21/2013	PTLR98AtrnS1BBPS

Unmatched disbursements exist for various reasons. For example, your organization may have submitted these transactions to the processor from outside of the program, or the automatic reconciliation may not have successfully matched these transactions with their counterparts in the database. An unmatched status may also occur when transactions successfully matched corresponding transactions, but were not automatically reconciled because time zone differences caused transaction date inconsistencies.

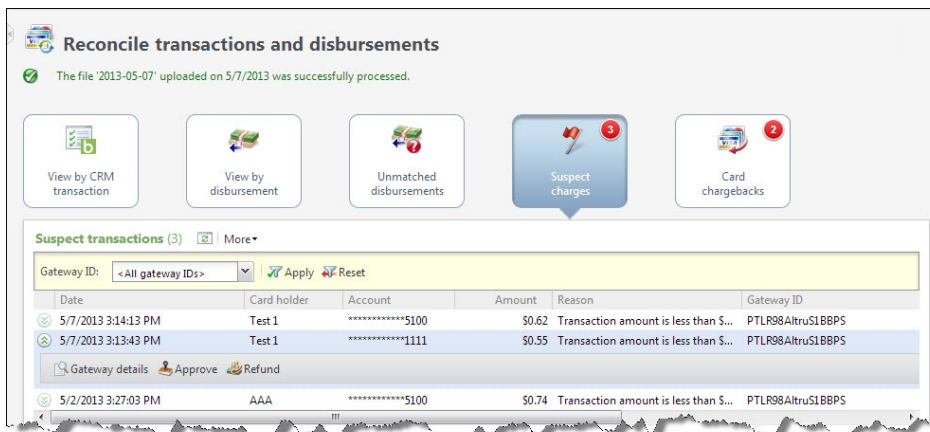
From this tab, you can manage these transactions as necessary. You can remove a transaction from the list, or search the database for a transaction's match.

## View Suspect Transactions

On the Suspect charges tab, review transactions processed through **Blackbaud Merchant Services** and flagged as suspect when they meet specific criteria. Transactions flagged as suspect help avoid costly fees associated with potentially unnecessary transactions. Examples of suspect criteria include a questionable IP address or multiple identical transactions from the same credit card within a short amount of time.

**Tip:** The number that displays next to the Suspect transactions tab header offers a quick view of the number of suspect transactions that exist.

From the Suspect charges tab, you can filter transactions by **Gateway ID**, view transaction and gateway details, and select to approve or refund transactions.



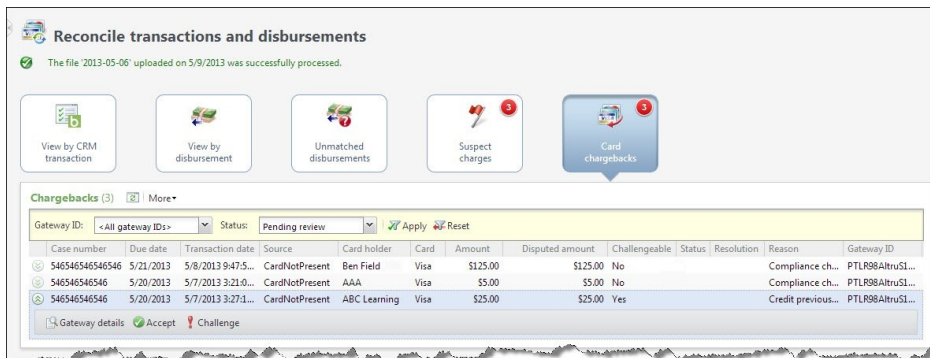
**Note:** To promote a more streamlined experience, we removed the **Suspect transactions** and **Chargeback transactions** links that previously existed directly on the Treasury page.

## View Chargeback Transactions

On the Card chargebacks tab, use the **Status** filter to review specific chargeback requests processed through **Blackbaud Merchant Services**. Chargeback transactions occur when a card holder disputes the validity of a transaction with the credit card company. For example, if the credit card used is reported stolen or the card holder does not recognize the transaction, the credit card company issues a chargeback request to **Blackbaud Merchant Services**.

**Tip:** The number that displays next to the Card chargebacks tab header offers a quick view of the number of chargeback transactions that are pending review.

From this tab, you can filter transactions by **Gateway ID**, view transaction and gateway details, and select to accept or challenge transactions.



**Note:** To promote a more streamlined experience, we removed the **Suspect transactions** and **Chargeback transactions** links that previously existed directly on the Treasury page.

## Status Overview

On the View by transaction and View by disbursement tabs of the Reconcile transactions and disbursements page, you can view various status indicators in the **Status** column for a transaction.

- **Reconciled** signifies that transactions in the disbursement report correspond to transactions in your database.
- **Pending** signifies that transactions exist in your database, but have not been reconciled to a disbursement transaction. This status only displays on the View by transaction tab.
- **Suspect** transactions are automatically flagged by **Blackbaud Merchant Services** when they meet specific criteria. Transactions flagged as suspect help avoid costly fees associated with potentially unnecessary transactions. **Blackbaud Merchant Services** does not disburse funds from a suspect transaction until you approve it. You can view suspect transactions from the View by transaction tab and Suspect charges tab.
- **Unmatched** disbursements display any transactions in the disbursement report that do not match corresponding transactions in your database. Unmatched transactions display on both the View by disbursement and Unmatched disbursements tabs.
- **Fraud fee** is a credit card processing fee associated with the **Fraud Management** service offered through **Blackbaud Merchant Services**. These fees display on the View by disbursement tab for informational purposes.
- **Chargeback pending** signifies chargeback requests. When a card holder disputes the validity of a transaction with the credit card company, the credit card company issues a chargeback request to **Blackbaud Merchant Services**.
- **Chargeback disputed** signifies chargeback requests that have been challenged.
- **Chargeback resolved** signifies chargeback requests that have been addressed. This is the final status applied to a chargeback transaction.
- **Chargeback refund** signifies a refund transaction. After **Blackbaud Merchant Services** issues a refund, a chargeback refund transaction is generated and displays on the View by disbursement tab. If a corresponding transaction exists in the program, you can update the original transaction as necessary.

## Blackbaud Internet Solutions

### Internet Explorer 11 Support

**Blackbaud Internet Solutions** now includes administrative and website browser support for *Internet Explorer 11 (IE11)*. For example, you can use *IE11* to create a web page from *Site explorer*, *Pages & templates*, and a website user can use it to access the page on your site.

To support the full-page functionality testing that is required for the new browser, *Internet Explorer 8* is no longer supported.

**Note:** When you use non-supported browsers, you can still log in and use the program and website pages, but some features may not render correctly.

For a full list of supported browsers, refer to the [System Requirements](#).

## Image Library

To help support profile image enhancements in this version and to provide better image search functionality, the new **Image owner** field now appears on the Search tab in *Image library*. Use this field to search for an image by the owner's first name or last name. The image owner is the person who originally uploaded the image to your website. These images may have been uploaded by someone at your organization for a web page or they may have been uploaded by a website user for a profile page.

The screenshot shows the 'Image library' interface with the 'Search' tab selected. The 'Image owner' field is highlighted with a red oval. The interface includes a title bar, an 'Add images' button, a description, tabs for 'Folders' and 'Search', and several search filters: 'Name or tag' (text input), 'Image ID' (text input), 'Type of image' (dropdown menu), 'Approval status' (dropdown menu), 'Image owner' (text input, highlighted), and 'Site' (dropdown menu). At the bottom are 'Search' and 'Clear' buttons.

**Image library**

Add images

In *Image library*, you can upload, store, and profile photos.

Folders Search

Name or tag:  
  
*All or partial*

Image ID:

Type of image:  
All ▼

Approval status:  
All ▼

Image owner:

Site:  
 Blank Client Site

Search Clear

**Note:** For more information about the profile image enhancements, see [Profile Update Form on page 122](#).

## Blackbaud Secure Payment API

**Blackbaud Internet Solutions** includes new API endpoints that allow custom parts to use Blackbaud's secure payment page. For example, a customization can pre-populate the Blackbaud secure payment page with biographical information entered on the custom part to improve data entry speed for donors. A customization can also store a donor's credit card information.

**Note:** The Blackbaud secure payment offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this page. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, see the [Developer Guide](#). If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- AmountAsCurrency
- ApplicationIdentifier
- ApplicationPreferredName
- Note
- Source As TransactionSource
- Transaction
- VerificationMethod As VerificationMethod

In **Blackbaud Internet Solutions** 3.0 service pack 5, the following endpoints were added to support this functionality.

- BBNCExtensions.Parts.CustomPartBBSPEditorBase
- BBNCExtensions.Parts.CustomPartBBSPDisplayBase
- BBNCExtensions.API.NetCommunity.Utility.SecurePayments
  - StoreCardInfo
  - CardNotPresent
  - TransactionResponse
  - Redirect

## Parts

The following *Parts* enhancements are available. For more information, refer to the *Parts Guide*.



## Language Tab Changes

Updates to the Language tab include a new default message for incorrect reCAPTCHA entries on forms and an option to change the default value that appears in drop down fields.

**Note:** For information about updates to the Language tab for the Donation Form and Payment 2.0 parts, refer to [Donation Form on page 1](#) and [Payment 2.0 on page 1](#).



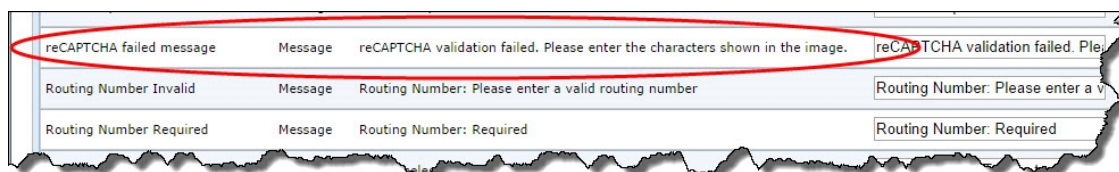
Default value for drop down fields	Field label	<Please select>	<Please select>
Designation	Field label	Designation:	Designation:
Donation Information	Heading	Donation Information	Donation Information

This table lists the category where the option appears for each part.

Part	Category
Donation Form	Donation Information
Event Registration Form	Registration
User Login	Registration Form

## reCAPTCHA Failed Message

The default message that appears when website users enter incorrect values for reCAPTCHA images on forms is changed. Previously, the message instructed users to enter "the words" shown in the reCAPTCHA image. Now, the message instructs them to enter "the characters" since the images typically include both text and numerical values.



reCAPTCHA failed message	Message	reCAPTCHA validation failed. Please enter the characters shown in the image.	reCAPTCHA validation failed. Ple
Routing Number Invalid	Message	Routing Number: Please enter a valid routing number	Routing Number: Please enter a v
Routing Number Required	Message	Routing Number: Required	Routing Number: Required

To change the new default message, navigate to the Language tab on the parts that include reCAPTCHA and update the text in the **reCAPTCHA failed message** row.

This table lists the Language tab category for each part that includes the row.

Part	Category
Donation Form	Validation Messages
eCards	reCAPTCHA
Payment	Validation Messages



Part	Category
Payment 2.0	Validation Messages
User Login	reCAPTCHA

## Default Value for Drop Down Fields

A new **Default value for drop down fields** option is available on the Language tab so you can specify the text that appears when no value is selected for a field. Previously, <Please Select> always appeared as the default value, regardless of a page's language setting.



This table lists the category where the option appears for each part.

Part	Category
Donation Form	Donation Information
Event Registration Form	Registration
User Login	Registration Form

## Directory

**Show Me:** [Review the walkthrough to learn more](#)

When website users open profile pages from Directory part search results, a new **Back to search results** link appears at the top. Users click the link to return to the directory and view their search criteria and results.



[< Back to search results](#)

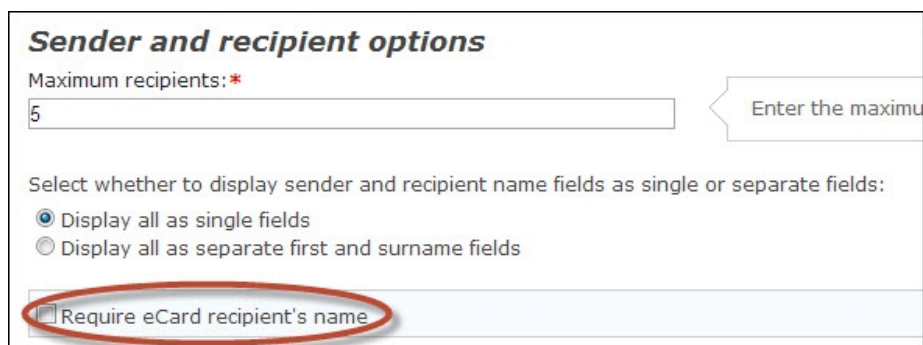
Title: Mrs.  
Name: Pearl Albright  
Suffix:  
Nickname: Pearl  
Gender: Female  
Birth date: 11/8/1987  
Country: United States  
Address line 1: 2532 Burwell Heights Rd  
Address line 2:  
Class of: 2009  
School: College of Business  
Major: Accounting  
Degree type: BS

This website usability enhancement eliminates the need for users to click menu links or the browser back button to return to the directory page. It also saves users time from entering search criteria again.

**Note:** This link does not appear for Chapter Manager part directories.

## eCards

A new **Require eCard recipient's name** field appears on the eCards part to prevent blank values in merge fields that you add to eCard messages. When you select this option, the program requires website users to enter a value for **First name**.



**Sender and recipient options**

Maximum recipients: \*  
5 Enter the maximum number of recipients

Select whether to display sender and recipient name fields as single or separate fields:

☒ Display all as single fields  
☐ Display all as separate first and surname fields

☒ Require eCard recipient's name

## Transaction Manager

When you design a Transaction Manager part, the **Select the tabs to display** section now appears so you can select whether to display only the History or Active tabs on your website.

**Select the tabs to display**

This part can display a donor's giving history and current transactions. You select whether to display the History tab, Active tab, or both. To display the donor's previous transactions, select **History tab**. To display the donor's current recurring gifts, pledges, and event registration fees, select **Active tab**. To include both tabs, select **Both** and select the default tab to appear when the donor opens the web page.

☒ History tab  
☐ Active tab  
☐ Both tabs

This only displays the donor's previous transactions on the History tab.

To display both tabs on your site, you can select **Both tabs**. When you do this, a field appears on the right for you to select the tab to display when users first access the part on a page.

**Select the tabs to display**

This part can display a donor's giving history and current transactions. You select whether to display the History tab, Active tab, or both. To display the donor's previous transactions, select **History tab**. To display the donor's current recurring gifts, pledges, and event registration fees, select **Active tab**. To include both tabs, select **Both** and select the default tab to appear when the donor opens the web page.

☐ History tab  
☐ Active tab  
☒ Both tabs

This displays the History and Active tabs. In the field below, select the default tab to appear when the donor opens the web page.

Active tab ▼

**Tip:** When you upgrade to this version, both tabs continue to appear on your site and the Active tab still displays first.

In addition, the Language tab text you enter in the "Transaction Manager - Help Text" category to clarify each tab's purpose to users now appears at the top of the tab.

Active History

This tab displays your previous transactions.

Date range: All dates ▼

Designations: All designations ▼

Group by: ▼

Apply

Date	▼ Gift type	Fund description	Amount
No data found matching the filter criteria			

Page 1 of 1

These improvements were made to provide additional flexibility with the part based on your organization's needs and preferences. For example, if you did not want the Active tab to appear in the

past, you can now remove it. If you want both tabs to appear, but prefer the History tab appears first, you can now select to do this.

## User Login Part: Constituent Attributes

In **Blackbaud Internet Solutions**, the User Login part now includes the ability to change the order of the constituent attributes appearance on the form and modify their labels. Under **Attributes**, click and drag the dotted button on the far left to move an attribute in the updated grid. To change the label text, enter it in the **Caption** field.

These updates provide flexibility so you can specify how the attributes should appear on the form, such as if you want them in the same order as they are arranged in **Blackbaud CRM**.

**Attributes**  
Select which constituent attributes will display during the user registration process.

Constituent attribute options

	Include	Field	Caption	Require
⋮	<input checked="" type="checkbox"/>	Dietary Preference	Dietary Preference	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Committees	Committees	<input type="checkbox"/>
⋮	<input type="checkbox"/>	# of Family Members	# of Family Members	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Closing Codes	Closing Codes	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Interests	Interests	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Organization Type	Organization Type	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Origin	Origin	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Retirement Date	Retirement Date	<input type="checkbox"/>

## Email Templates

**Show Me:** [Review the walkthrough to learn more](#)

To improve email marketing for mobile users, six new mobile friendly email templates are available for you to copy and use as new templates. These templates are more narrow in width and include larger fonts for improved usability on mobile devices. They also render more consistently across mobile devices, browsers, and desktop and web-based email programs. You can easily identify these in the email templates grid by viewing templates with "Placeholder" in the **Description** column.

**Templates**

[New template](#)

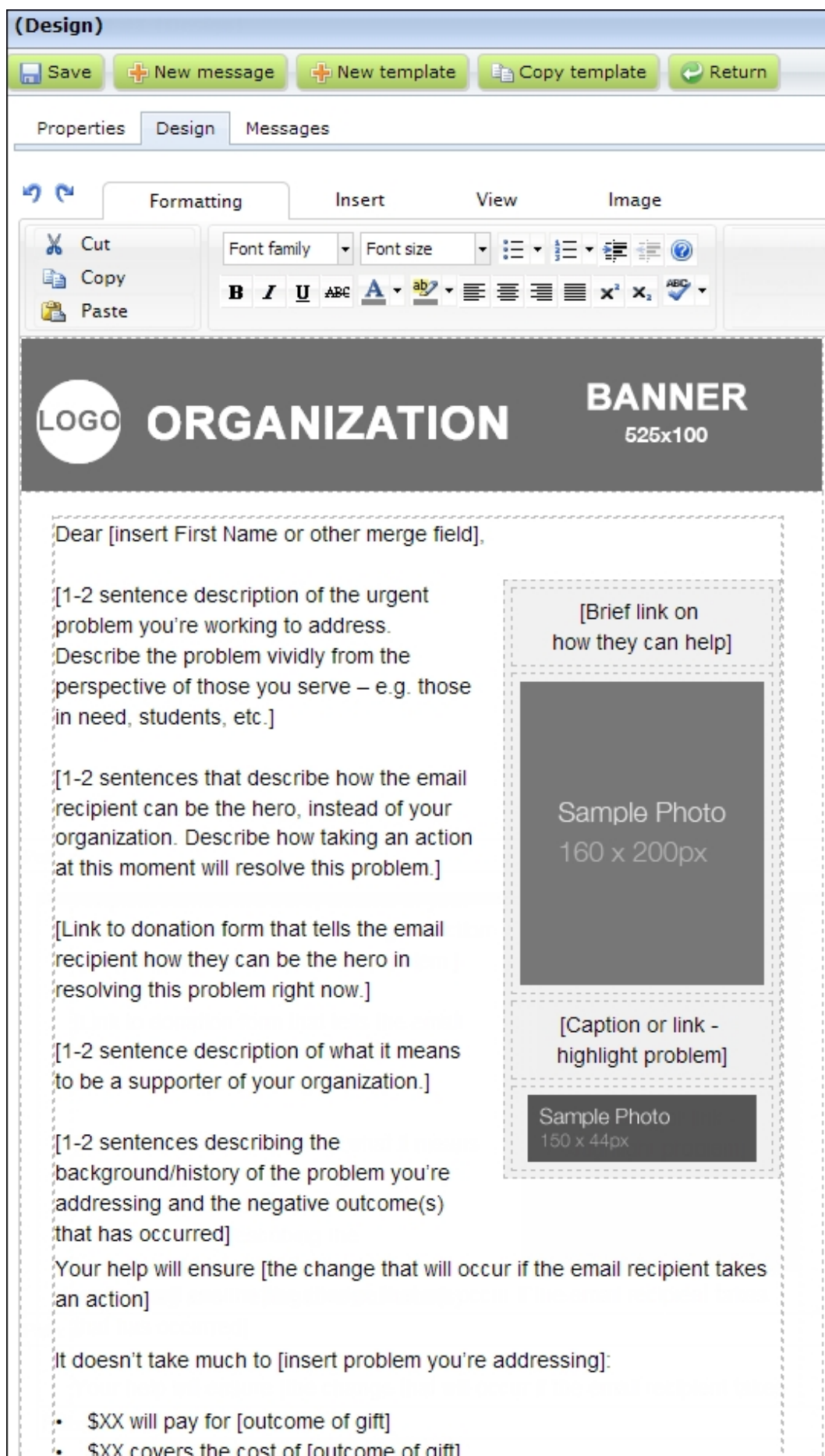
Create and manage email message templates. Templates define the default content and message options for the emails which target specific lists.

Filter by site:  Filter by name:  Filter by subject:  Filter by data source:

Action	Name	Description	Subject	Data source
	Campaign Email #1 - Kickoff	Placeholder	Placeholder	None
	Campaign Email #2 - Follow-up	Placeholder	Placeholder	None
	Campaign Email #3 - Last Chance	Placeholder	Placeholder	None
	eNewsletter Template	Placeholder	Placeholder	None
	Holiday Greetings Template	Placeholder	Placeholder	None
	One Column Template	Placeholder	Placeholder	None

6 email templates meet selected criteria

To copy a mobile friendly template, select the one you need. In the **Action** column, click **Click here to copy this email template**. After you copy it, update all placeholder text with your unique content in the new email template. For example, you can replace the merge field placeholder text with merge fields in the HTML editor. You can also replace the sample logo banner with your organization's logo banner.



Below is a list of the six mobile friendly email templates. To secure the content in the templates, you cannot edit or delete them.

- Campaign Email #1 – Kickoff
- Campaign Email #2 – Follow-up
- Campaign Email #3 – Last Chance
- eNewsletter Template
- Holiday Greetings Template
- One Column Template

**Tip:** One copy of each mobile friendly email template exists in the program. When you host multiple websites, you access them in each site's *Templates* area.

## Administration

The following *Administration* enhancements are available. For more information, refer to the *Administration Guide*.

### User Image Options Setting

To help support the profile image enhancements and so you can improve how you organize images, a new **Default profile image folder** field now appears in site settings for images. In this field, select the default folder profile images upload to in *Image library*.

**Note:** For more information about the profile image enhancements, see [Profile Form on page 1](#).

**User image options**

☒ Require approval for all images uploaded by users

Maximum number of images allowed per user:  (enter zero for no limit)

Maximum image size:  KB (enter zero for no limit)

Default image folder:

Default profile image folder:

When you select **Require approval for all images uploaded by users**, you must approve each profile image in the *Image library* before it appears on your website. Until you do this, it only appears for the user who uploads it.

### Custom Error Page

**Show Me:** [Review the walkthrough to learn more](#)

In *Sites & settings*, a new **Error page** field is available under **Pages** on the Settings tab for default, parent, and child sites. In the field, you select a web page from *Pages & templates* to appear if errors occur.

**Pages**

Site page titles: ☒ Show organization name  
☐ Show site name  
☐ Show browser title

Home page:  The **Home page** is the main page for your website.

Privacy page:  The **Privacy page** contains your privacy information and a link to it appears in email messages.

Error page:  The **Error page** appears whenever users attempt to access another page that generates an error message, such as a 404 or 406.

Authorization failed page:  The **Authorization failed page** appears when users access another page without rights to view it.

This allows you to create a custom message and include information to help identify the causes of errors.



**Note:** If you do not select an error page, system messages from *Internet Information Service (IIS)* appear when errors occur.

To provide detailed information in the message, use the new error merge fields in a Formatted Text and Images part. The merge fields insert responses from the website server if pages do not load properly. The error merge fields include:

- Error code — The numeric portion of a standard response code, such as 404 or 406.
- Error description — The reason for a standard response code, such as not found or not acceptable.
- Error log ID — The database number that corresponds to the server error.

**Note:** Error log IDs help Blackbaud Support track the reasons for errors on your website.

## Favicon Images

**Show Me:** [Review the walkthrough to learn more](#)



You can now add branding to your web address so users can quickly associate it with your organization. Use the new **Favicon image** field in general site settings to select a small icon to represent your website. The image appears in browser address bars and locations where users save your website URL, such as browser favorite lists.



To add a custom favicon to your site, click **Browse** beside the **Favicon image** field and select an .ico image file. We recommend you upload a 16x16 or 32X32 pixel image for maximum display quality in modern browsers on desktop and mobile platforms. If you select an image with a different file type or size, or if the file does not convert correctly to .ico, the file may not render correctly in all browsers.

**Note:** The image file size must be 50KB or less.

Previously, websites rendered favicons in browser address bars only when an .ico file was sized and saved in *Image library*.

**Tip:** If Blackbaud hosts your website, we recommend you add a favicon image to prevent issues when there are environment changes.

## Forms

The following *Forms* enhancement is available. For more information, see the *Forms Guide*.

### Communication Preferences Form: Active Email Addresses

When you include the **General Correspondence** element on a Communication Preferences form, only active email addresses now appear. Previously, the element included inactive email addresses but not inactive mailing addresses. This change creates consistency between the email and mailing address behavior.

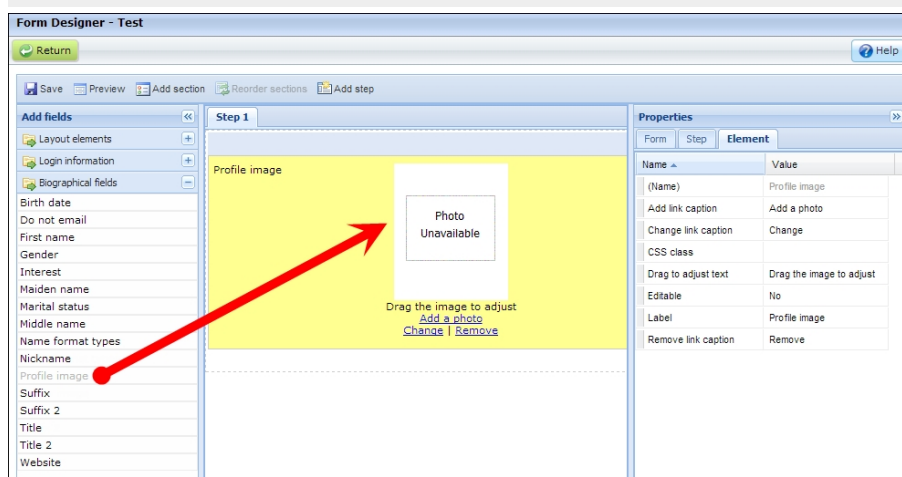
**Tip:** To ensure correct email addresses appear on forms, we recommend you properly maintain historical dates on email addresses.

## Profile Update Form

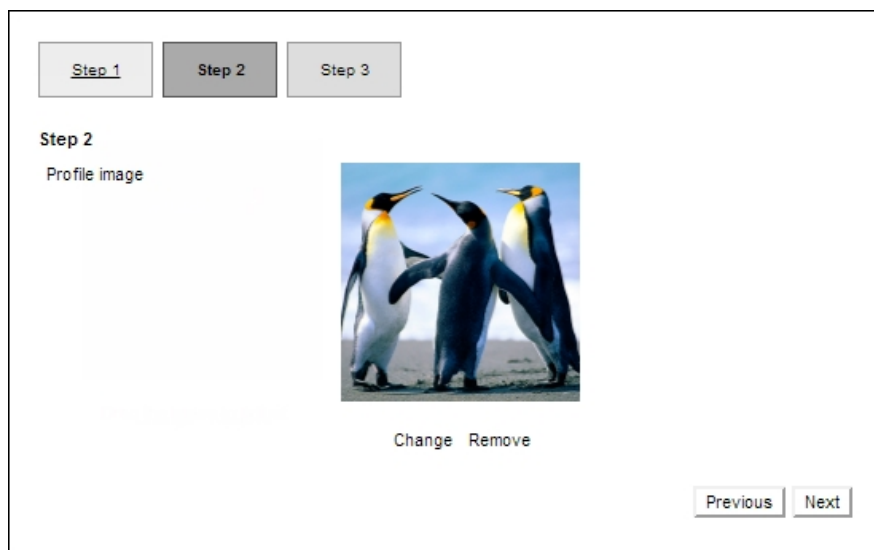
**Show Me:** Watch a video about the [new profile image](#) enhancements and [review the walkthrough](#) to learn more.

To simplify profile image management for your organization and improve the website user experience for profile images, the Profile Update Form now includes a **Profile image** element. When you include this in the design area, you provide the ability for website users to easily add, edit, or remove profile images.

**Note:** When you implement this new profile image feature, the program automatically uses the most recent profile image for a user as the current profile image.

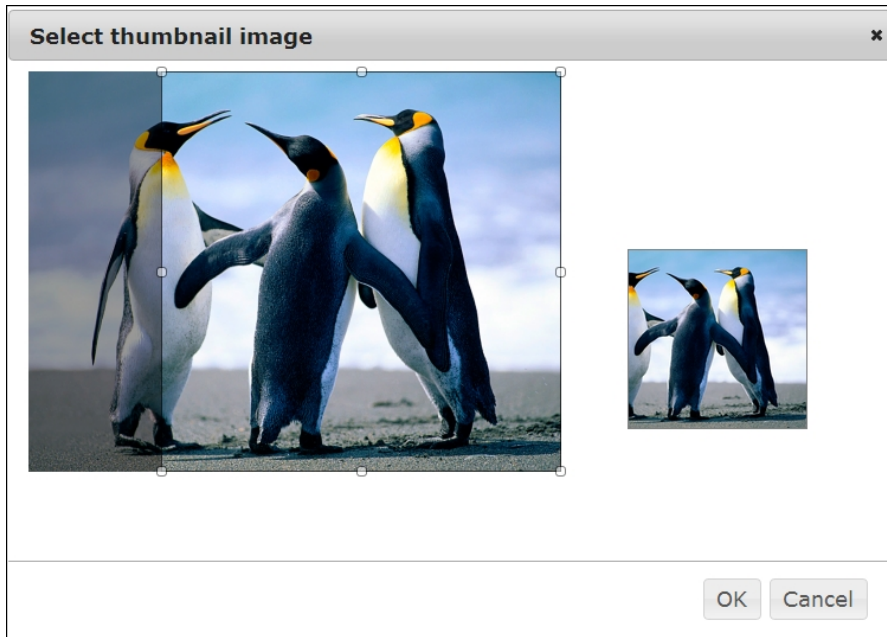


When a profile image displays on a profile web page, a square thumbnail of the user's image appears. The user can change or remove the image by clicking the links below it.



**Note:** When a website user has an existing profile image and uploads a new one on the profile page, the new profile image overwrites the previous image. This occurs on your website and in *Image library*.

To select the portion of it that appears as the profile, the user clicks the thumbnail image. On the screen that appears, the user drags the box to highlight the portion of the image to display and a thumbnail example appears on the right.



Before a user uploads a profile image, a default silhouette image appears as the profile. A link to add an image appears below the silhouette.



**Tip:** To help support the profile image enhancements and improve how you organize and search for profile images, there are additional new features in *Image library* and *Administration*. For more information, see [Image Library on page 110](#) and [User Image Options Setting on page 119](#).

## User Photos Form

Previously, profile images saved as a profile image type when they were uploaded on the User Photos Form part. With this release and the profile image enhancements on the Profile Update Form, images uploaded on the User Photos Form save as a personal type. You can design these images to display on the web page with the profile image from the Profile Update Form.

**Warning:** After you implement the new profile image on the Profile Update Form, we recommend you remove any User Photos Form parts that display profile images. If you do not remove them from your website, you risk inadvertently overwriting profile images. The most recent image uploaded by users remains as the current profile image automatically when you use the new profile image. Therefore, you can remove these User Photos Form parts from your site.

When an image's tag is the same as the tag selected on the User Photos Form part, the image displays on the page regardless if the image type is personal or profile. Previously, only profile image types displayed. To view personal and profile image types in your database, in *Image library*, select the type to view in the **Type of image** field on the Search tab. You can view the tags for an image on its properties.

## Profile Display

As a part of the profile image management enhancements, the Profile Display part now includes a **Profile image** merge field in the HTML editor and height and width fields for you to configure maximum profile image sizes.

In the **Max height/width for full-size image** field, you enter the maximum display height and width for full-size profile images that display when users click thumbnails on the web page. In the **Max height/width for thumbnails** field, you enter the maximum height and width for profile image thumbnails on the web page.

Source:\*

Current user

Select the profile type to appear for a website user. "Current user" displays the profile for the logged-in user. "Directory" displays on a page that links from a directory.

Max height/width for full-size image:

px

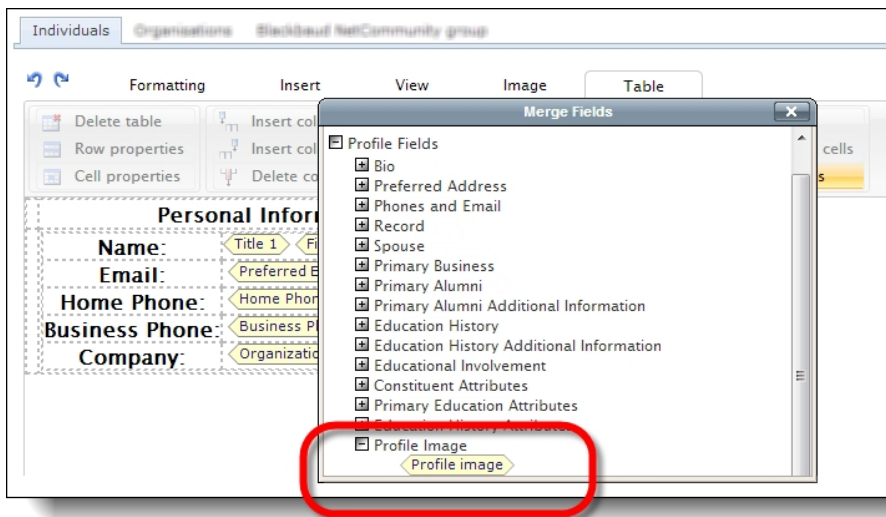
When you select to include the **Profile image** merge field in the HTML editor, enter the maximum display height and width for profile images when users click thumbnails on the web page.

Max height/width for thumbnails:

px

When you select to include the **Profile image** merge field in the HTML editor, enter the maximum thumbnail height and width for profile images on the web page.

The HTML editor includes the **Profile image** merge field on the Individual tab. To display the image a user uploads on the Profile Update Form, include this merge field in the design box.



When you do this, the image appears on the read-only profile display web page for other website users to view. The square cropped image that a user selects on the Profile Update Form displays as the profile image thumbnail. When website users click the thumbnail, the full-size image displays.

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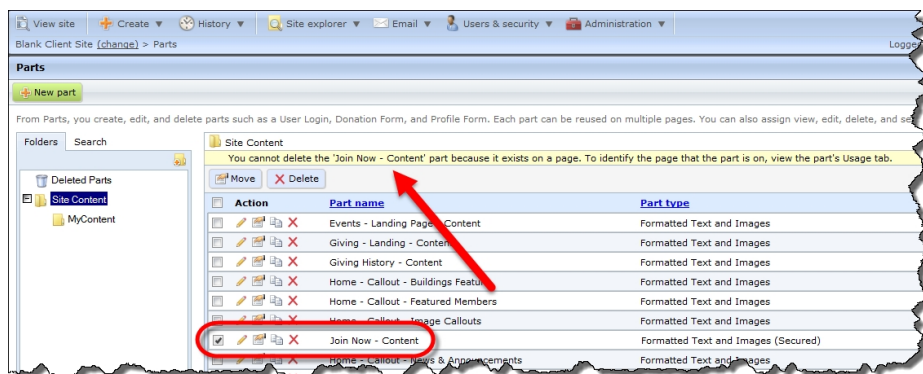
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## Service Pack 1

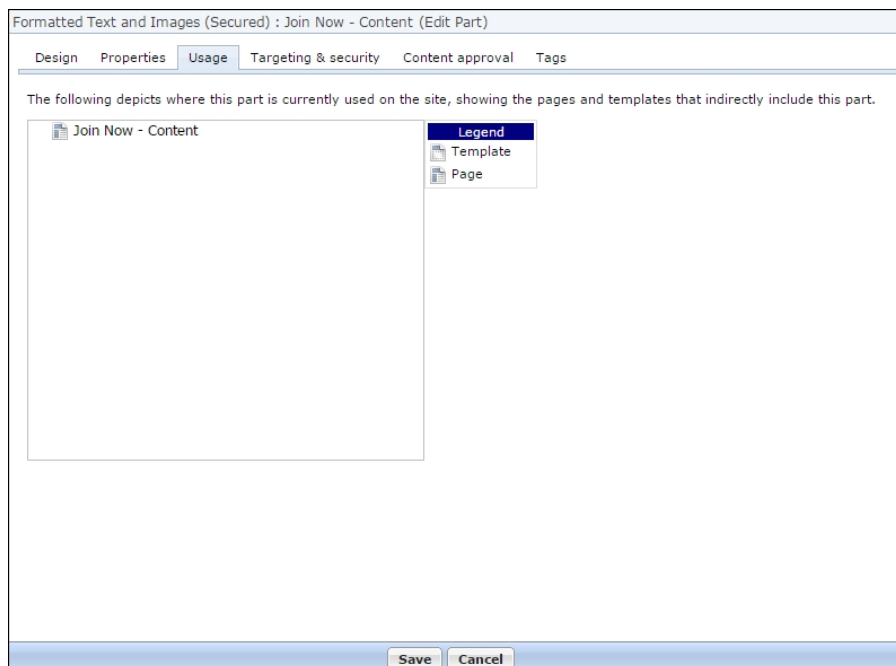
These features were introduced in Service Pack 1 after the original **CRM 4.0** release.

## Part Removal Safeguard

To prevent you from inadvertently removing active content from your **Blackbaud Internet Solutions** website, you can no longer delete parts when they are associated with web pages. When you attempt to delete a part that is associated with a single site, or shared across multiple sites, a message appears to inform you that you cannot remove it because it exists on a page.



To identify the pages where the part appears, select the part's Usage tab.



## Blackbaud Internet Solutions Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. **Blackbaud Internet Solutions** was automatically updated in this

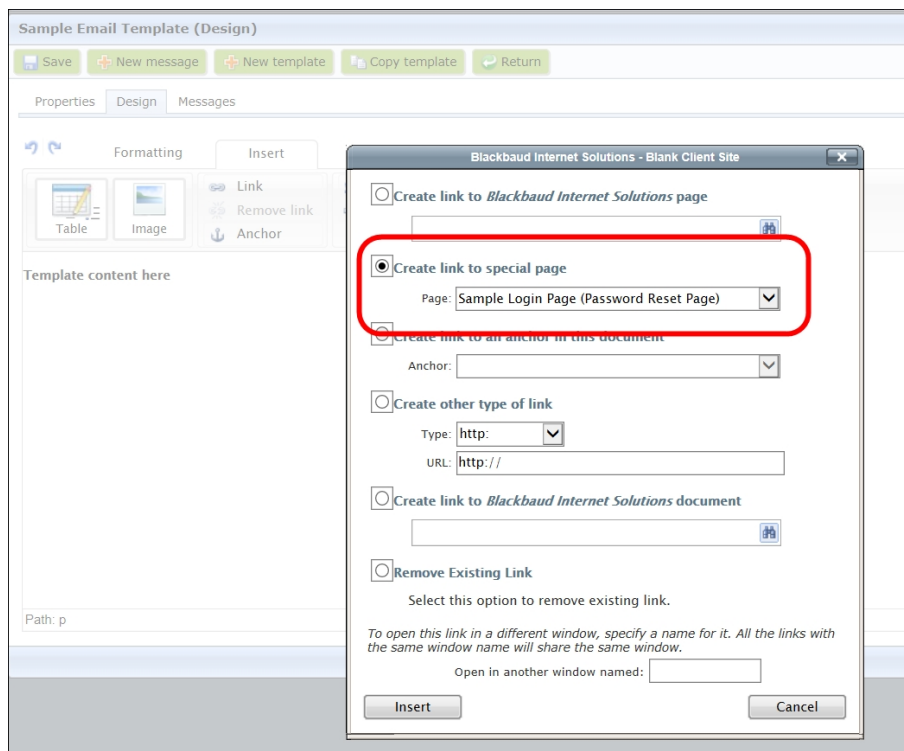
release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product. Please refer to this list to determine whether your organization needs to take any action.

- If your organization uses a customization to provide website registration or login functionality, the customization may not work correctly if it directly accesses the ClientsUsers table in the database. Instead, we recommend customizations use the methods contained in the Blackbaud.Web.Content.Core assembly and User class. If your organization uses standard **Blackbaud Internet Solutions** functionality for user login and password reset or if your customization calls passwords via the Blackbaud.Web.Content.Core assembly and User class, no action is required on your part.
- If your organization uses an iFrame from a third party website to direct users to **Blackbaud Internet Solutions** Donation, Event Registration, Membership, Sponsorship Form, or Sponsorship Search parts, you need to update the website to direct users to a form on a **Blackbaud Internet Solutions** page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the **Blackbaud Internet Solutions** page.

**Note:** Blackbaud historically has not recommended the use of iFrames due to security issues. For more information, read the Knowledgebase article [here](#).

## Password Reset Page Link

To improve password reset security in email messages from **Blackbaud Internet Solutions**, you now select a user login password reset page from the **Create link to a special page** option on the HTML Editor when you design the email message.





**Tip:** The ability to create a special page to link to your user login page (that you define for **Page** settings in *Sites & settings*) previously existed. With this feature, any page that contains a User Login part now appears from the drop down and you want to select the user login page that navigates users to your forgotten password page.

This new link remains active in an email for the user to take action to reset the password any time.

When an email recipient clicks the link, a secure page appears with a **Forgotten Password** field for the user to enter their email address.

After the email address is submitted, another email sends to the user. That email contains another link that returns the user to the password reset page on your website.

Previously, the **Password** merge field was available in email messages that use a Registered Users data source. With this update, this merge field no longer includes the password in an email. When a recipient receives the message, the placeholder for the field is blank. As a result, make sure you remove the **Password** field and create user login password reset page links in email messages to guide your users to reset their password.

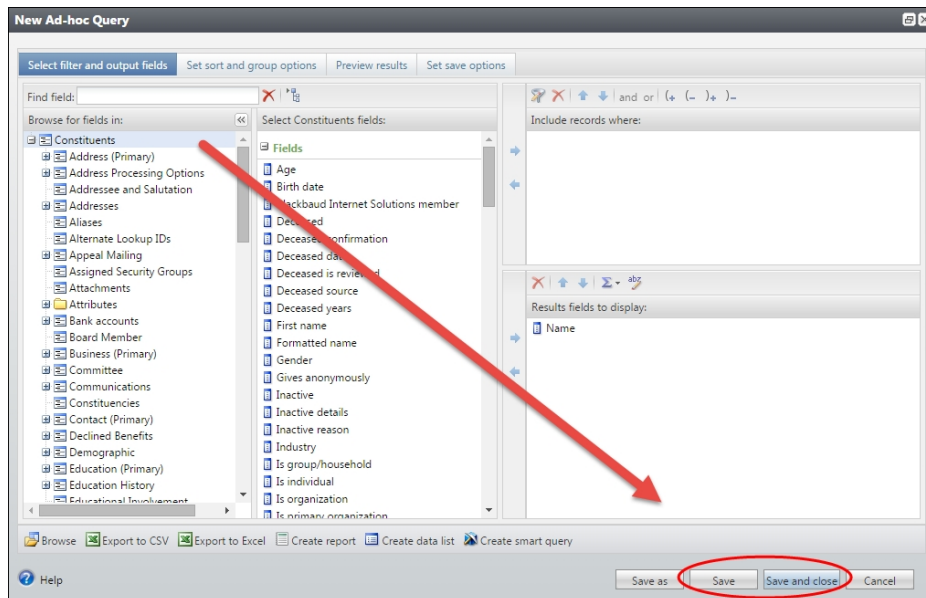
## Social Media Login Welcome Email

Now when Blackbaud Internet Solutions website users register for the site with social media login credentials, the program sends them a confirmation email to welcome them to the site. Previously, the

program did not send these users an email. The program uses the same welcome email template you configure for other website registrants, but it merges "<social media username> via <social media account>" in the Username field.

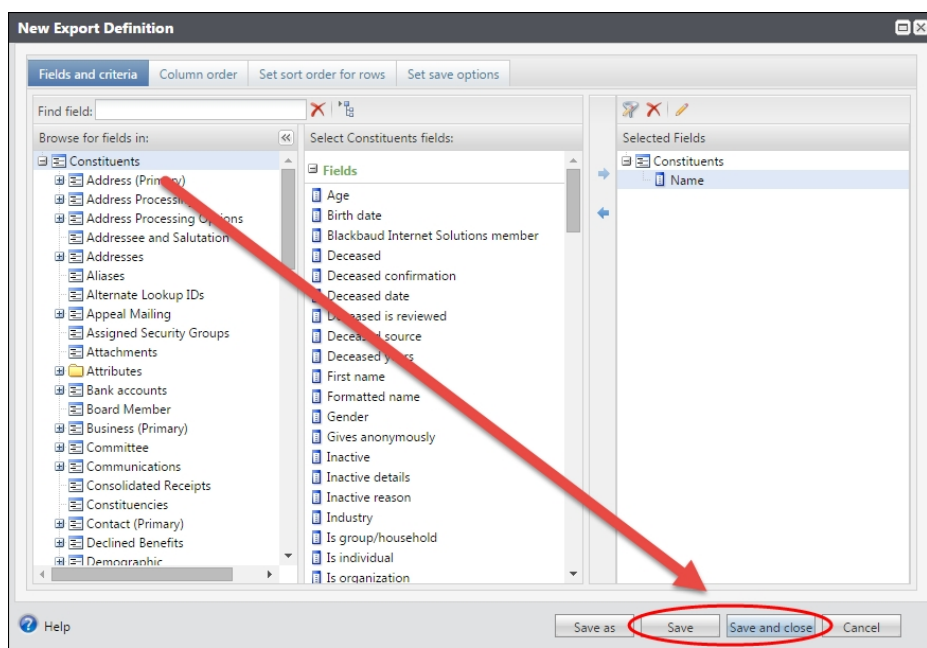
## Save and Close Options for Query

Previously, when you clicked **Save** from the Ad-hoc query screen in *Analysis*, the program saved your changes and closed the screen. Now, you have the option to click **Save** to save your changes and continue working with the query, or click **Save and close** to save your changes and close the screen.



## Save and Close Options for Export Definitions

Previously, when you clicked **Save** from the Export Definition screen in *Administration*, the program saved your changes and closed the screen. Now, you have the option to click **Save** to save your changes and continue working with the export definition, or click **Save and close** to save your changes and close the screen.



## Date Field Changes for Data List Exports to Excel

Now when you export a data list that includes date fields to Excel, the spreadsheet includes date and time information when a time is saved for any of the dates in the list. Previously, the spreadsheet only included date information, so when a date included the latest time in the day such as 11:59:59.999 PM for a membership expiration, Excel rounded the date to the next day.

## Enhanced Contribution Criteria for Membership Programs

When you create a contributions-based membership program, you determine which giving activity is counted toward the levels of the membership. The options for setting up the criteria are on the Contributions tab when you add a program and on the Rules tab when you edit a program. However, now you can get even more specific by using a Revenue Application selection or Installment Plan Payment selection instead of the predefined checkboxes and options. The criteria you use in the query will determine which giving activity is counted.

**Edit contribution based rules**

When membership levels are awarded based on contributions...

**What giving activity counts?**

**What types of giving activity are counted toward a membership?**

☐ Count giving activity of these types:

☒ Payments for donations, pledges, recurring, and planned gifts include activity for:

☒ Pledges

☒ Recurring gift payments

☒ Event registrations include:

☒ Membership dues include:

☒ Count giving activity in this selection:

**Existing options**

**Can multiple revenue transactions count toward a membership?**

☐ No, only a single revenue transaction counts

☒ Yes, the combined amounts of multiple revenue transactions count

The time frame used to determine giving activity depends on the term (such as "1 year" or "3 years") and expiration date calculation. In rare cases when a constituent gives many small gifts and is awarded a membership based on a small final gift, the member will not receive benefits if the fair market value of the benefit is greater than the amount of the final gift.

**New option**

**What happens if they give more?**

During the renewal window, giving activity automatically applies toward a renewal. Before the renewal window, apply additional giving:

☐ As additional revenue

☐ Toward an upgrade

☒ Toward a renewal

**When does the membership expire?**

**What date should be used to calculate the expiration date?**

☒ The transaction date of the gift

☐ The last day of the month the gift was received

Help Save Cancel

When you upgrade, existing contributions-based membership programs continue to work the way they did before. However, you can edit the rules for the program to use a selection instead.

## Update Only Addresses with NCOA Changes

Previously, AddressFinder update options did not allow you to only update addresses that had been changed by the AddressFinder process, so you had to either update only forwardable addresses or all addresses. You can now use the new **Update only NCOA changes** option, which allows you to only update addresses that have been changed by the process.

**Edit AddressFinder process options**

**Update options**

☐ Update only addresses with forwardable moves  
☐ Update all addresses  
☒ Update only NCOA changes  
☐ Save former address in constituent address list when there is a forwardable move  
 Set address type on former address to:

**Map the AddressFinder footnotes and mail grade to the Do Not Mail reasons**

Moved with no forwarding address:   
 PO box closed:   
 Move to foreign address:   
 Change of address form filed, but new address not in USPS records:   
 Temporary address has lapsed:   
 Address is undeliverable (mail grade F):

**Address source**

Information source:

[? Help](#)
[Save](#)
[Cancel](#)

You access this screen from the Data Tune-Up page from *Administration*. For the AddressFinder process you want to edit, under **Step 3**, click **Edit Properties**.

## Sustained Giving

In **Blackbaud CRM 4.0**, we introduced significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs.

In Service Pack 1, we enhanced the following areas to further define the features we initially introduced.

- [Amendments for Recurring Gifts](#)
- [Payment Methods for Recurring Gifts](#)
- [Skipped Installments for Recurring Gifts](#)

## Amendments for Recurring Gifts

In **Blackbaud CRM 4.0**, we introduced amendments on the Activity tab of a recurring gift record. Under **Activity**, most amendments associated with a recurring gift appear and are sorted by the most recent event. Amendments represent any manual or global process change to the properties of a recurring gift. For example, when you edit the payment method of a recurring gift or change the recurring gift's status, these actions are recorded as amendments on the activity timeline.

In Service Pack 1, for recurring gifts with a payment method of "Direct debit - pay installments automatically" the **Mandate** field is now captured. This field only appears when a European (SEPA) banking system is enabled and the currency is set to Euros. This change is captured when you edit the field on the Edit payment method details screen of a recurring gift, and through an Enhanced Revenue Batch and Revenue Update Batch.

## Payment Methods for Recurring Gifts

In Service Pack 1, we added "Cash" and "Check" as **Payment method** field options on a recurring gift record. By selecting either option, you can track the number of recurring gifts associated with a cash or check payment method in a given time period. This may be useful in reports or for general reference.

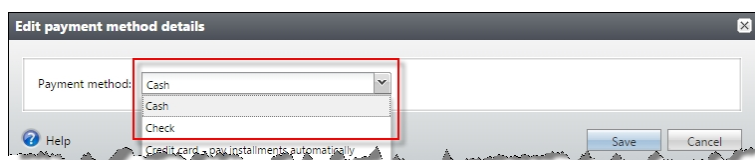
"Cash" and "Check" now appear as **Payment method** field options and are reflected in the following locations:

- Under **Payment information** on the Add a recurring gift screen.

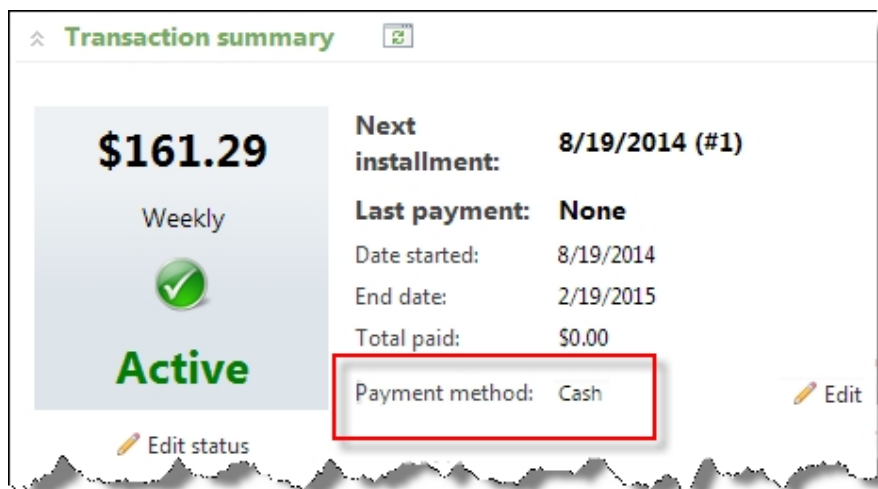
The screenshot shows the 'Add a recurring gift' form. The 'Payment information' section is highlighted with a red box, showing the 'Payment method' dropdown menu with 'Cash' selected. Below it, the 'Special instruction' field is visible with 'Check' as an option. The 'Schedule' section shows a table of installments.

Date	Amount
1/7/2015	\$500.00
2/7/2015	\$500.00
3/7/2015	\$500.00

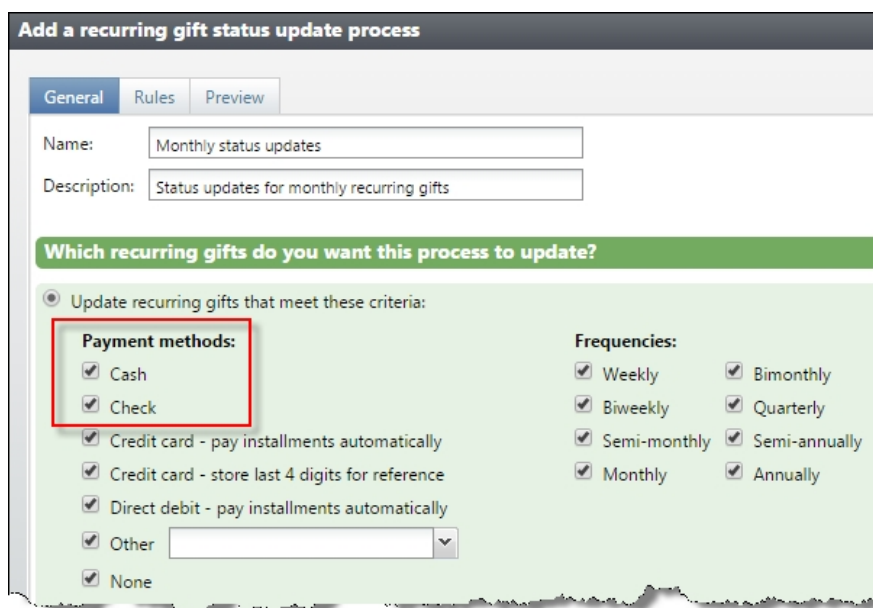
- Edit payment method details screen for a recurring gift.



- Transaction summary section for a recurring gift record.



- Update recurring gift statuses business process.



- Amendment details on the Activity tab of a recurring gift.
- Revenue queries.
- Revenue Update Batch, Enhanced Revenue Batch, and Sponsor Batch.
- Add, transfer, and reassign sponsorship screens as well as the Add a recurring additional gift screen.

## Skip Recurring Gift Installments

In Service Pack 1, we made changes to the behavior of skipped installments. From the Activity tab of a recurring gift record, you can now skip any expected installment in the following scenarios:

- The installment date is no more than five days prior to the current date.
- No payments or write-offs have been applied to the installment.
- No payments have been applied to any installment after the one you want to skip.
- There are no skipped installments after the one you want to skip.

## New Social Media Finder Service for WealthPoint

To help you find and track social media accounts for your prospects, we added a new data service to *WealthPoint*. *PeopleGraph*, a Dun & Bradstreet company, uses email address information from your constituent records to find social media data in Blackbaud's Social Media Finder service.

### Watch how Social Media Finder works in a *WealthPoint* screening

The social media data that returns on a wealth screening is stored on a new Social Summary tab on the wealth and ratings record. On the Social Summary tab, you can track the social media accounts for your prospects and if you have the Social Media Finder subscription, social media accounts, profile images, demographics, and ratings appear here after a *WealthPoint* screening.

**Tip:** If you are interested in the Social Media Finder add-on subscription, contact your Blackbaud Account Representative or email us at [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

The screenshot displays the 'Social Summary' tab for a prospect named Lindsey M. Rix. The interface includes a sidebar with navigation options like 'Link Tank', 'Wealth Summary', 'Model Scores', 'Assets', 'Giving', 'Affiliations', 'Biographical Information', and 'Social Summary'. The main content area is divided into several sections:

- Social media image (3):** Shows a profile picture with options to 'Use as main profile image', 'Save image as...', and 'Delete this image'.
- Social media biography (5):** Provides details such as Source (PeopleGraph), Full name (Lindsey Rix), Gender (Female), Location (Charleston, South Carolina, United S...), Occupation (Staff Technical Writer), and Company (Blackbaud).
- Social media rating:** Displays a rating of 5 out of 5, with a description: 'Heavy social users who often share content and reach a large audience.' It also shows 'Social Influencer' metrics: Influence (624) and Outreach (6).
- Social media accounts (4):** A table listing various social media services and their associated URLs, confidence levels, match codes, and descriptions.

Social media service	URL	Confidence	Match code	Match code description	Source	User ID
Flickr	[Redacted]	5	SM1	Last Name, First Name, E...	PeopleGraph	[Redacted]
Flickr	[Redacted]	5	SM2	Email Address	PeopleGraph	[Redacted]
gravatar	[Redacted]	5	SM2	Email Address	PeopleGraph	[Redacted]
Twitter	[Redacted]	5	SM1	Last Name, First Name, E...	PeopleGraph	[Redacted]

**Note:** Target Analytics and our data providers are contractually bound to comply with all local, national, and international legal requirements related to the collection, transfer, and storage of social media information and other constituent data. As an analytics provider of a publically traded company, maintaining compliance with the law is our top priority - we will not offer any solution that we believe puts our clients or shareholders at risk.



## About Social Media Finder

Unlike other data sources in *WealthPoint*, when you perform a *WealthPoint* screening for social media information, you are not returning results from a Target Analytics database. Instead, we're using *PeopleGraph*'s API to search and return results directly from them. Therefore, when *PeopleGraph* updates its database, it will be immediately available to you the next time you perform a *WealthPoint* screening. While *PeopleGraph* may update the social media services in their database, they currently have over 90 social sources in its search including *Facebook*, *Twitter*, *LinkedIn*, *Flickr*, *Etsy*, *Google+*, *Instagram*, *Pinterest*, *tripadvisor*, *WordPress*, *Vimeo*, *YouTube*, and more.

**Note:** *PeopleGraph* may add social media sources at any time. If we hear of new services added, we will inform you. Potentially, they may have to adjust or remove some of their social media services due to privacy changes and API restrictions. For example, as a social media service increases in popularity, so does the value of their data as a revenue source. Some services will choose to maintain a very open API, like *Twitter*. However, others can decide to restrict access to data in their API at any time. Keep note of these two possibilities when you screen prospects.

However, just as with wealth data, if prospects do not want their social media information shared, most services enable users to voluntarily implement strict privacy settings. And, users are allowed to change their privacy settings at any time so your results may change based on user preferences.

## How Social Media Finder Works

Blackbaud's Social Media Finder returns data on a *WealthPoint* screening only. With or without the Social Media Finder subscription, all records will have a Social Summary tab on the wealth and ratings record. A Social Media Finder subscription is not required to add and maintain social media accounts manually. However, with Social Media Finder, social data that returns from a *WealthPoint* screening lives on the Social Summary tab with the manually entered social media accounts.

During a *WealthPoint* screening, up to 5 email addresses are sent to *PeopleGraph*.

Priority is given to the primary email address on record. The primary email address and the next 4 most recently added email addresses are sent to *PeopleGraph* for their social media search.

**Tip:** We recommend you verify email addresses before you screen and consider re-screening when you receive a new email address. For example, it can be common for people to have multiple email accounts for different purposes. It is possible that little or no social media accounts may return for your prospect because you may not have the personal email address he or she used as the contact email on the social media service account.

Ultimately, the success of the individual or group wealth screening for social media information depends on the record or records you send to *PeopleGraph*. Consider that older constituents may not have the number of accounts that younger constituents have. Have you been able to verify both personal and professional emails for your constituent? And, do your prospects want to be found on social media?

Those who do return large amounts of data hold even more value over other prospects because they likely have invested much time in developing their online network, influence, and outreach. You should consider developing a relationship with those who return high ratings and large numbers of accounts because they may be great candidates for furthering the message of your organization.

## Social Media Images

When *PeopleGraph* searches for your prospect, they return up to one social media image per email address. However, because it's an image, *PeopleGraph* can't determine which profile image from a social media account most looks like your prospect. For example, is the picture that returns for a social media account a headshot, group photo, beloved pet, grandchild, or a field of flowers? Instead, *PeopleGraph* picks the best image based on a formula they developed. The formula to decide which image to return for each email address is based on which account they determine most important. Therefore, the social media images that return may not be what you consider most important in the prospect research world.

We recommend you review the images and delete those that are not applicable. However, just like other data from *WealthPoint*, it can return on your next wealth screening. If there is an image that captures the prospect well, you can easily use the image as your main profile image or save to your computer. When you scroll through the images that return, click **Use as main profile image** to quickly update the constituent's main profile image. The old constituent image deletes and is replaced by the new one from your *WealthPoint* screening.

## Social Media Biography

Based on the data *PeopleGraph* finds, we provide a Social Media Summary for your prospect. To review the information, from the Social Summary tab of a wealth and ratings record, click **Review details**.

The information for the social media biography summary fields are based upon the social media accounts returned by *PeopleGraph*. If the location, occupation, company, name, or gender fields are inaccurate or incomplete, you can update the information. For example, *PeopleGraph* may populate the gender field with "Unknown" based on the social media data it finds, however you likely know and can update that information.

To show you how *PeopleGraph* found the location, occupation, and company, we provide a details section with the information found for each email address sent to *PeopleGraph*.

## Social Media Ratings

The influence and outreach scores are provided by *PeopleGraph* and are based on *Twitter* accounts. If a prospect does not return a *Twitter* account, they will not have ratings. *PeopleGraph* also relies upon the service [Kred.com](https://kred.com) to determine how trusted *Twitter* accounts are, how often the account's content is shared, and how large is the account's network.

The Social Media rating is based on a Target Analytics algorithm. Among other factors, the algorithm does consider the influence rating, outreach rating, and number of social media accounts returned.

For more information about the meaning of the social media, influence, and outreach ratings, review the rating descriptions below.

### ➤ Social media rating:

**5 – Social Influencer:** Individuals who are very heavy social users, and often share content. They have large followings, which gives them major influence when they interact with others. They are normally very involved on *Twitter* and *Facebook*, with multiple posts per day. Most importantly, their content is

frequently re-shared by others. Individuals and companies will target influencers directly because of their large networks. They hope the influencers can help spread their message.

**4 – Content Cultivator:** Heavy social users who are very active, but do not carry the network size or have the impact of a true influencer. While they have less impact than the influencer, they can be very helpful to nonprofits because they habitually share content. These individuals are great to connect with because they increase the chances of your message reaching a large audience.

**3 – Socially Connected:** Individuals in this segment have a presence on all three major networks, *Facebook*, *LinkedIn*, and *Twitter*. Also, they often use other platforms (ex. *Pinterest* and *Instagram*) but interact with a smaller social circle than influencers or cultivators. They are less likely to share content, or shift people's point of view with their opinions. They use social often, but more for entertainment and family interactions.

**2 – Multi-Networker:** Individuals who are socially-savvy enough to have a presence on several platforms, but are largely passive users. They log into *Facebook* several times a week to change their status, and sometimes have *LinkedIn* or *Twitter* accounts. However, social media is a small part of their lives. Because they aren't as engaged, they are not as exposed to content they may relate to and as a result, share with others infrequently.

**1 – Social Starter:** Individuals who typically have only one social media account. They also aren't heavy users and have very little influence. Most often they use only *Facebook*, and on average are older than the mainstream social media user. They are only engaged on the network because their peers or family members are, and they log in occasionally to see "what's going on."

**0 – Unconnected:** We were unable to find social media accounts linked to the prospect's email address.

### ➤ Influence rating:

The influence rating is based on how likely others are to retweet or share that individual's social media posts with their networks. The higher the influence rating the better. Those whose content gets shared regularly help shape other people's opinions. Anything above 700 is considered excellent.

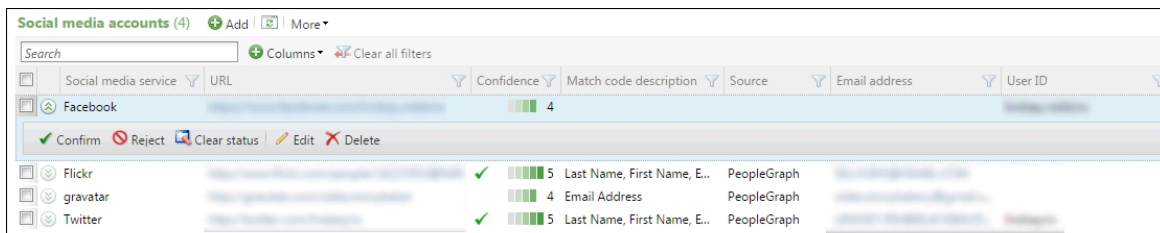
### ➤ Outreach rating:

The outreach rating ranks how likely a user is to comment on or share content on *Facebook* and retweet others' social media posts within his or her network on *Twitter*. A good score means the person is a "sharer," and someone that may help spread your message. A score of seven or higher is considered excellent.

## Social Media Accounts

The social media accounts are a combination of manually entered accounts and the ones that return from *PeopleGraph*.

**Note:** If you add a social media account through the constituent record Contact tab, it is automatically added to the wealth and ratings record Social Summary tab, and vice versa.



When you periodically screen prospects with *WealthPoint*, new information can return, especially if you were able to send a new email address. However, before you screen, you can choose to **Delete social summary**. All data that *PeopleGraph* returns, including social media images, social media biography, social media ratings, and social media accounts, will delete. Then, when you wealth screen, it is possible to return less or different accounts than the last time you screened. There are three main reasons this can occur:

1. Did the email addresses change since the last time you wealth screened the prospect?
2. The prospect could have changed his or her privacy settings for the social media service.
3. The social media service could have changed its privacy settings and terms for its API, and therefore restricted *PeopleGraph*'s ability to locate records based on email address.

## Helpful Tips for Social Media Accounts

- Only manually added and confirmed social media accounts appear as icons below the profile picture on the wealth and ratings record or on the contact information tile of a constituent record.
- The links in the list are clickable. For example, click a social media service link in the **URL** column to open the social media account in a new browser tab.

**Tip:** Facebook and other account links work better if you log in to the social media service first. We recommend you log in to *Facebook* before you click social media icons or URLs on a wealth and ratings record.

- When you delete a social media account that returned from a wealth screening, it operates the same as other wealth data that returns. It removes the information temporarily, but it can return on the next *WealthPoint* screening.
- To confirm the social media account is your prospect's, use the URL and match code description to determine if the data from *PeopleGraph* is accurate.
- To remove the confirmed or rejected status from a social media account, click the double arrows for the record's row in the list and click **Clear status**.
- Even when you subscribe to Social Media Finder, you may need to add an account manually from time to time. For example, if you do not know the email address for a prospect but a basic Google search of the person based on name and geography returns an account, you will want to track this on the wealth and ratings record.
- For social media accounts that return from a *WealthPoint* screening, we automatically add new social media services (including the icon) for you to the Social Media Services page in *Constituents, Configuration*.

## Social Media Data Recommendations

While social media is a quickly evolving yet newer field of data, there is much to be done with the data that does return. Use these ideas for how to leverage social media information to the benefit of your organization.

1. Use social media accounts to verify information about your prospect including occupation, employer, interests, and affiliations.
2. Use social media to identify your most important content cultivators and influencers. Not only can you search for prospects who have the capacity to donate to your organization but you can identify people who can use their great influence on social media to promote your cause. For example, have you heard that your organization is planning an important event? You may want to consider researching and providing your event coordinators a list of those with great social media influence so they can invite them to the event. Well connected individuals can help promote the event and increase awareness.
3. Use social media to confirm relationships and connections. Can you identify someone at your organization (donor, employee, trustee) that already has an established relationship with the new prospect? Social media can help you determine if there's someone who can give your fundraisers the edge with a personal introduction.
4. Which social media services should you invest your time developing a strong message and network for your organization? Base your decision on the most popular social media accounts that return for your constituents. If most of your constituents are on *Twitter*, *LinkedIn*, or *Facebook*, develop your accounts there and then perhaps consider whether you can finally close your *Myspace* or *Google+* account.
5. Provide fundraisers the key social media accounts that can help them to get to know and connect with prospects.
6. Create a constituent query and filter records by social media service. For example, you can create a filtered list of just prospects with a *Twitter* account and provide it to the person in your organization who's in charge of updating and growing your organization's social media accounts. A list of constituents who care about your organization and a link to their related account can grow your network and influence much more quickly than organic, word of mouth growth.

## CoreLogic Property Valuation Update

For better property valuation estimates, Target Analytics has improved our algorithm for the property value model. This change enables us to consider additional property estimates in the property valuation formula.

CoreLogic property data can be found on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

## Additional Target Analytics Data Updates

In January 2015, we updated NOZA, FEC, Dun & Bradstreet, and CoreLogic data used in WealthPoint.

**Note:** With the CoreLogic data update, we saw a greater population of total market value in Indiana property records.

- **NOZA:** The world's largest database of public charitable donations. This information is stored on the constituent's wealth and ratings record, Giving tab, under Philanthropic gifts. For each donation, a gift range, organization donated to, organization category, gift year, and name on the gift returns. You can use the web address or source material to help you confirm the data belongs to your prospect.  
Every month, we add at least one million new gifts that can be searched.
- **FEC:** Federal Elections Commission data, from the Internal Revenue Service, contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns. This information includes the amount of the contribution, the recipient, and the date. This information is stored on constituent's wealth and ratings record, Giving tab, under the Political donations section.
- **Dun & Bradstreet:** The world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies. Also, they provide you with data about the constituent's employment. This information is stored on the constituent's wealth and ratings record, Assets tab, under Businesses section.
- **CoreLogic:** Tracks the constituent's real estate holdings including real estate valuation estimates. Identifies properties owned for a deed, parcel, and mortgage. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

## New Queries from the Blackbaud Data Warehouse

We have added two new query source views from the Blackbaud Data Warehouse: "Revenue (from the Blackbaud Data Warehouse)" and "Revenue Recognition Credits (from the Blackbaud Data Warehouse)."

These queries are similar to their counterpart queries from the transactional database. The queries from the data warehouse only include fields available in the warehouse, and they only show results as of the last time the ETL process was run. You can see when the data was last updated on the Preview results tab of the New Ad-hoc Query screen or the Edit Ad-hoc Query screen. You can also see the last updated date on the Results page when you run the query.

## Blackbaud Data Warehouse Reconciliation Report

We have added a Blackbaud Data Warehouse reconciliation report to help you compare summary information about your transactional database and your Blackbaud Data Warehouse.

You can access the new Reconciliation report tab on the Blackbaud Data Warehouse page.

**Blackbaud Data Warehouse**

ETL history | SQL agent job | ETL report | OLAP database roles | **Reconciliation report**

**Reconciliation summary (10)** Updated: 11 minutes ago

Search Columns Save list Open list Clear all filters

Record type	Transactional record count	Data warehouse record count	Reconciled
Address	12	12	✓
Constituent	71	71	✓
Constituent Appeal	3	3	✓
Education	1	1	✓
Interaction	4	4	✓
Opportunity	1	1	✓
Registrant	4	4	✓
Revenue	32	32	✓
Revenue Application	32	32	✓
Revenue Recognition Credit	23	23	✓

**Reconciliation exceptions (0)** Updated: 11 minutes ago

Search Columns Save list Open list Clear all filters

Exception

The report shows you the total number of items by category on your transactional database and on the data warehouse. Where the total counts match, you see a checkmark on the Reconciled column. Any exceptions are listed at the bottom of the report.

To take advantage of this fix, you must redeploy the Blackbaud Data Warehouse and complete an incremental refresh.

## Service Pack 2

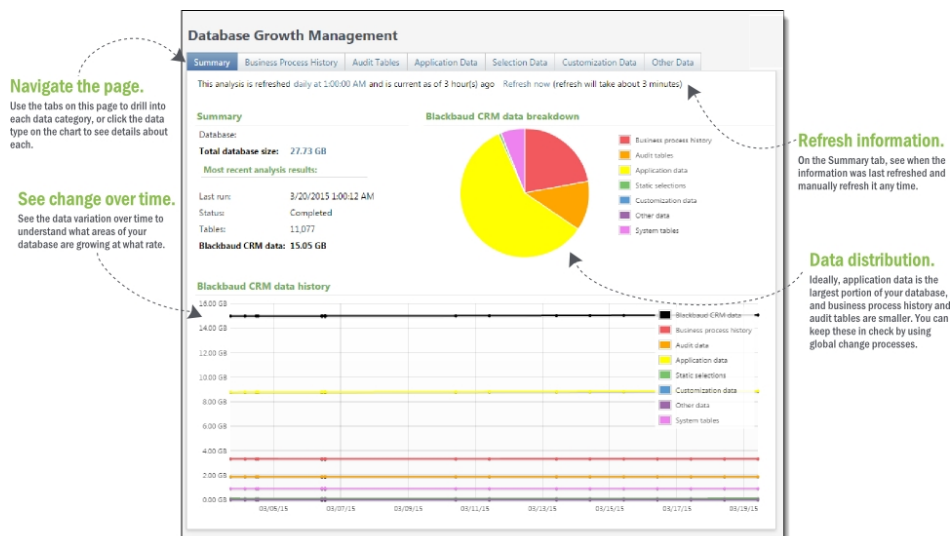
These features were introduced in Service Pack 2 after the original **CRM 4.0** release.

## Database Growth Management

We have added a new database analysis tool that allows you to view the size of your database and the space taken by different types of data. The Database Growth Management page provides insight and tools related to business process history, audit tables, application data, selection data, and customization data.

To access the new Database Growth Management page, from *Administration*, click **Database growth management** under **Administration**. Use the tabs to navigate detailed information about each data type in your database.

**Note:** When you first view this page, you will not see any data because the process has not run yet. By default, the process runs weekly, or you can manually run it anytime by clicking **Refresh now**.



- In the Summary tab, you can see the overall size of your database and the distribution of data by type and how data size has changed over time. Here, you can also see when the information was last updated and refresh it manually.
- In the Business Process History tab you see the amount of data generated by business processes. When you run a business process such as an export in **Blackbaud CRM**, the program stores a copy of the output. To regularly delete these outputs when you no longer need them, you can use the "Business process output delete" global change. **Blackbaud CRM** also keeps copies of batch output, which you can delete using the Batch report delete global change.
- The Audit Tables tab shows the amount of data used by audit tables. Audit tables keep details of changes made to the database by different users. You can use the "Delete audit data" global change to delete old audit table information you no longer want to keep.
- The Application Data tab itemizes the data that you enter into **Blackbaud CRM**, including records, attributes you created, data related to marketing efforts, and smart field calculations.
- In the Selection Data tab, you see the data taken up by selections, whether created by users, imported into the database, or generic selections that were created by other elements of the system.
- In the Customization Data tab, you can see information about custom tables you created using the **Blackbaud CRM** SDK.
- In the Other Data tab, you see the total amount of data that does not fall into any of the previous categories. This is usually minimal, but can show data from tables you created outside of the **Blackbaud CRM** SDK.

The data included in this tool is updated weekly and the last refresh time is posted on the Summary tab. To refresh the data outside of the automatic refresh process, click **Refresh now** on the Summary tab. The program indicates an estimated time required for the refresh to let you decide if you want to wait or refresh at another time.

As part of this work, we have also added a new option to the "Business process output delete" global change. You can now choose whether you want to delete all output older than a certain timeframe or all output except a certain number of the most recent runs. Previously, you could only use the first option.



To use the new option, on the Add global change screen for the "Business process output delete" global change, click **Delete output tables for all but the most recent** and enter the number of runs you want to save.

**Add global change**

Type: Business process output delete

Name:

Site:

**Parameters**

☒ All business processes

☐ Selected business processes

Selection:

Delete output tables ☐ generated by business process runs older than

☒ for all but the most recent  runs

**Note:** Deleting business process output does not affect your ability to view business process history. You can still see the full history of business processes even when the output for those processes has been deleted.

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

To learn more about the new Database Growth Management tool, see the new [Database Growth Management Guide](#).

## Pledge Installment Improvements

With this release, we improved functionality for pledge installments to improve quality, and increase reliability, accuracy, and consistency.

These improvements ensure accurate and consistent behavior when adding or editing a pledge through a record, Enhanced Revenue Batch, or Revenue Update Batch in the following fields:

- The value in the **Installment amount** field consistently reflects the most recent amount entered.
- The values in the **Installment amount**, **No. installments**, and **No. installments remaining** fields are accurately calculated in the pledge installment grid.

- The **No. installments** and **No. installments remaining** fields represent the number of installments that are not fully paid.
- When you edit installment designations and enter different installment values, the value in the **Installment amount** field consistently represents the earliest installment amount that is not fully paid.

**Tip:** While the **No. installments** and **No. installments remaining** fields are labeled differently, both fields behave the same way throughout the program. For example, the **No. installments** field displays on the Add a pledge screen and represents the number of installments for a new pledge. The **No. installments remaining** field displays on the Edit pledge screen and represents the number of remaining installments for an existing pledge.

## Sustained Giving

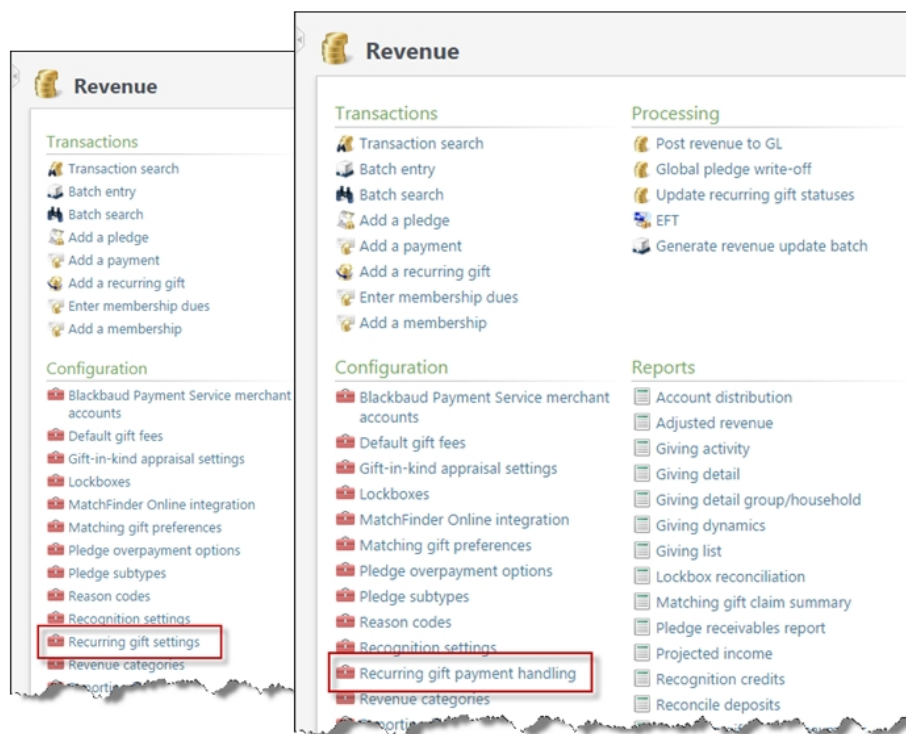
In **Blackbaud CRM 4.0** and Service Pack 1, we introduced significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs.

In Service Pack 2, we made further changes to the recurring gift area. With this release, you can now work with several payment handling options for recurring gifts. With these options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installment after applying a payment. Previously, you could only select to update installment amounts to match an incoming payment or maintain installment amounts. These new options offer more flexibility and accuracy for handling payments.

The payment handling feature affects the following areas of the program.

## Recurring Gift Payment Handling

With this release, on the Revenue page, we replaced the **Recurring gift settings** configuration option with the new **Recurring gift payment handling** option.



Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

Click **Recurring gift payment handling** to access the Recurring gift payment handling screen.

**Recurring gift payment handling**

**How would you like to handle payments when more than one past installment has a balance?**

☒ Apply the payment to the oldest installment with a balance

☐ Apply the payment to the most recent installment with a balance

**How would you like to handle payments that OVERPAY the installment balance?**

☒ First, apply the excess amount to any other past installments with a balance (from oldest to most recent)

Then...

☒ Apply any remaining excess to future installments

☐ Increase the installment amount to include the excess payment amount (other installment amounts are unaffected)

☐ Add a donation for any remaining excess

☐ Do not apply the excess amount to other past installments with a balance

☐ Increase the installment amount to include the excess payment amount (other installment amounts are unaffected)

☐ Add a donation for the full excess of the payment

**How would you like to handle payments that UNDERPAY an installment balance?**

☒ Apply the payment and leave a balance for the installment

☐ Apply the payment and automatically write-off the remaining installment balance of a past installment

☐ Decrease the installment amount to match the payment amount (other installment amounts are unaffected)

**How would you like to handle remaining past installment balances after fully applying a payment?**

☐ Leave any balances

☒ Automatically write-off all past installment balances ⓘ

Help Save Cancel

With these new configuration options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installments after applying a payment.

**Note:** Note that installments with today's date are included as "past installments" for the purposes of payment handling.

## Add and Edit a Recurring Gift Payment

To ensure consistency across the product with the new payment handling options, we made several changes to the Add a payment and Edit a payment screens.

- When applying an amount to a recurring gift, on the Amount to apply screen, the **Next transaction amount** option now displays as **Next installment balance**. The **Past due amount** option now displays as **Past installment balance**.

- From the Amount to apply screen, note that **Past installment balance** is calculated based on the installment date. The calculation includes an installment balance that is due today or in the past. Previously, in version 4.0, this option was based on the installment status.
- Based on payment handling configuration options, donations created from overpaying an installment are automatically added in the application grid. A new donation is also created if you increase the amount in the **Applied** field.

Application	Description	Applied	Amount d...	Date ...	Balance
Recurring gift	Julie M. Bach	\$30.00	\$10.00	1/14/2...	\$0.00
Donation	BUILDING	\$5.00			

**Tip:** Donations created from payment handling configuration options also affect recurring gift payments added through Enhanced Revenue Batch and Revenue Update Batch.

When you edit a recurring gift payment, it is important to note the following behavior:

- When you edit a recurring gift payment, the payment handling configuration options that existed when you initially added the payment will apply to future edits of the payment. Note that if you added a payment prior to version 4.4, the options in place prior to the upgrade will apply to all future edits of the payment.
- Payment handling configuration options consider future and past installments in terms of the recurring gift payment date, not the date the recurring gift is edited.

Consider the following scenario as an example:

**On 02/05/2015 -**

- A recurring gift has two installments due on 01/01/2015 and 02/01/2015 for \$5 each.
- The payment handling options are set to apply the payment to any past installments with a balance, and create a donation for any excess after that.

- c. A payment of \$10 is applied to the recurring gift which pays the installments for 01/01/2015 and 02/01/2015.

**On 03/05/2015 -**

- An installment is now due on 03/01/2015 for \$5.
- The payment that was added on 02/05/2015 is increased to apply \$15 to the recurring gift.
- The additional \$5 will be split off as a donation. The 03/01/2015 installment is treated as a future installment during this edit because it was considered a future installment at the time the payment was originally added.

## Recurring Gift Activity Timeline

On a recurring gift record, the **Details** column of the Activity timeline now displays payment handling adjustment details for installments.

For example, when an installment is underpaid, and the payment handling option is set to apply the payment and automatically write-off the remaining installment balance, "Recurring gift payment handling" displays in the **Details** column.

Installment 3 - Paid		3/14/2015	\$10.00	\$0.00	Partially paid and partially written off
Manage write-offs					
Date	Activity	Amount	Balance	Details	
3/16/2015	Write-off		\$5.00	\$0.00	Recurring gift payment handling
3/16/2015	Payment		\$5.00	\$5.00	Check
3/14/2015	Expected		\$0.00	\$10.00	

**Warning:** When a recurring gift payment is deleted, all associated write-offs and adjustments are deleted as well.

## Next Installment Date Calculation

When you specify recurring gift payment handling configuration options, you can select to either apply a payment to the oldest or most recent installment with a balance.

**Recurring gift payment handling**

How would you like to handle payments when more than one past installment has a balance?

☒ Apply the payment to the oldest installment with a balance

☐ Apply the payment to the most recent installment with a balance

Based on your selection, the program calculates whether to apply payments to the oldest or most recent installment. Once this is calculated, the "next" installment to be paid is defined and reflected in the following areas of the program:

- Recurring gift transaction summary section
- Amount and date due on the Add a payment and Edit a payment screens
- Amount and date due in Enhanced Revenue Batch and Revenue Update Batch

- Installments associated with credit card and direct debit events, such as credit card processing and automatically generating payments
- Recurring gift next transaction date in *Query*
- Pledge reminders

## Existing Recurring Gift Settings

Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

When you upgrade to version 4.0 Service Pack 2, you must decide how you want the program to handle payments toward recurring gift installments. The following details explain how the previous option relates to the new payment handling option.

### ➤ Update Installment Amounts to Match Payments

In the previous version, when you selected "Update installment amounts to match payments," the installment balance that was due increased to match the payment received. No underpaid installment balance or future installment was affected by the overpayment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
  - a. Select **Do not apply the excess amount to other past installments with a balance**.
  - b. Select **Increase the installment amount to include excess payment amount (other installment amounts are unaffected)**.
- To handle payments that underpay the installment balance, select **Decrease the installment amount to match the payment amount (other installment amounts are unaffected)**.
- To handle remaining past installment balances after fully applying a payment, select **Leave any balances**.

### ➤ Maintain installment amounts

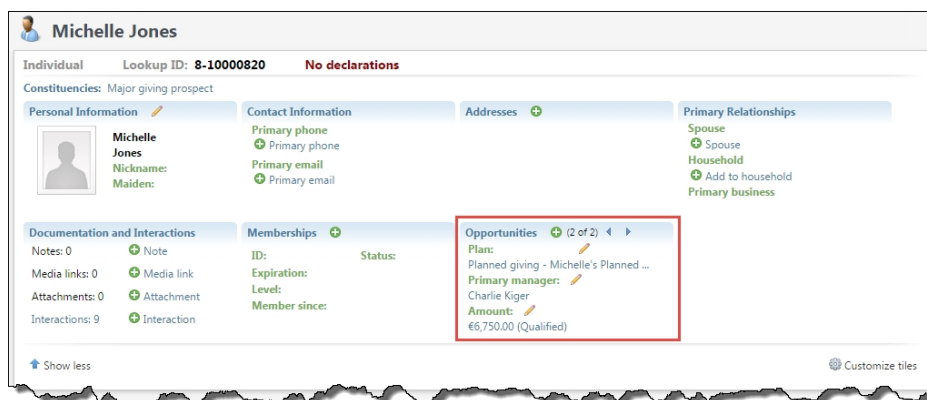
In the previous version, when you selected "Maintain installment amounts," the payment was applied toward the installment balances that were due and any overpayment amount was applied toward a later installment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
  - a. Select **First, apply the excess amount to any other past installments with a balance (from oldest to most recent)**.
  - b. Select **Apply any remaining excess to future installments**.
- To handle payments that underpay the past installment balance, select **Apply the payment and leave a balance for the installment**.
- To handle remaining past installment balances after fully applying a payment, select **Leave any balances**.

## Opportunities Tile on Constituent Records

The constituent record now includes the Opportunities tile, which summarizes opportunity information for individual constituents who are major giving prospects. You can add and edit a constituent's opportunity information from the tile, including the opportunity's plan, the plan's primary manager, and other information about the opportunity.



To add opportunities from the Opportunities tile, click **Add**. To edit opportunity information, click **Edit** next to the plan, primary manager, or the amount of the opportunity. If a constituent has more than one opportunity, you can use the arrows on the Opportunity tile to view each opportunity.

The amount that appears in the tile depends on the status of the opportunity. For example, if the opportunity status is qualified, response pending, rejected, or canceled, the tile displays the ask amount. If the opportunity is unqualified, the tile displays the expected ask amount. If the opportunity is accepted, the tile displays the accepted amount.

To open the related record, click the name of the plan, the name of the primary manager, or the opportunity amount.

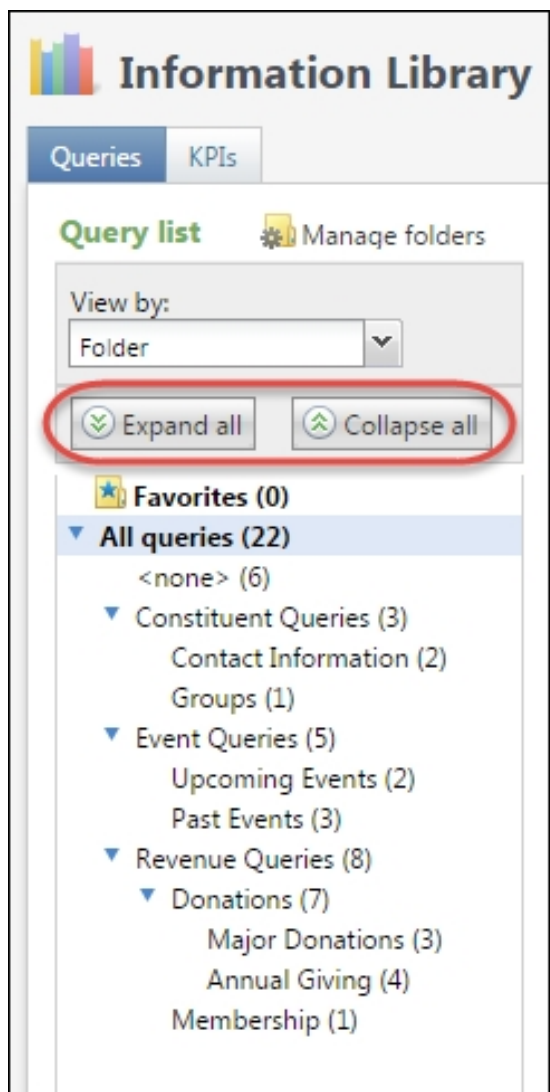
To open the Opportunities tab of the plan the Opportunities tile is displaying, click the tile name.



## Expand and Collapse Query Folders

To help you better sort through and find your queries, we have added the ability to expand all or collapse all query folders in the Information Library.

On the Query tab of the Information Library, you can now click **Expand all** and **Collapse all** to easily view your folders and subfolders.

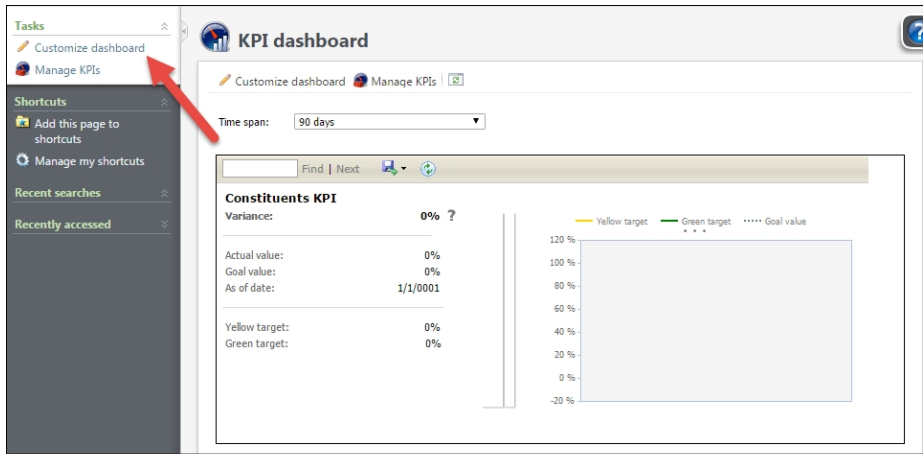


When you collapse all, only first-level folders are displayed. When you expand all, you see all your query folders and subfolders.

To access your queries, from *Analysis*, click **Information library**.

## Customize KPI Dashboard

You can now customize your KPI dashboard. From the dashboard, click **Customize dashboard** under **Tasks**.



The new Customize a KPI dashboard screen appears. You can create pages and tabs within pages to organize your KPIs. To add pages or tabs, click the plus sign next to the **Page** or **Tab** fields. You can edit existing pages and tab names by clicking the pencil icon, or delete them by clicking the red X icon.

You can also reorganize tabs within a page. To do this, click the engine icon next to the **Tab** field. On the Reorder SKPI Dashboard tabs screen, use the up and down arrows to rearrange tabs and click **OK** to save the new order.

Once you have created pages and tabs, to assign KPIs to them, select the KPI and click the right arrow to add it, or the left arrow to remove it from a page or a tab.

To access your KPI dashboard, from *Analysis*, click **KPI dashboard**.

## Performance Improvements for Group WealthPoint Screenings

To improve the performance when users screen a group of constituents through WealthPoint, Target Analytics is making the following updates.

Going forward, we will focus on returning the key relationships from GuideStar on a group screening:

- Known relationships (both people have been screened through WealthPoint and have a connection through a nonprofit found in GuideStar), regardless of form year

**and**

- A representative sample of the other relationships from the most recent years

For some nonprofit connections, we've seen the total number of relationships returned could be up to 20,000. For you to sort through 20,000 relationships and get the most pertinent information is unrealistic. Therefore, we have simplified the process. These initial results will then help you determine if it is worth

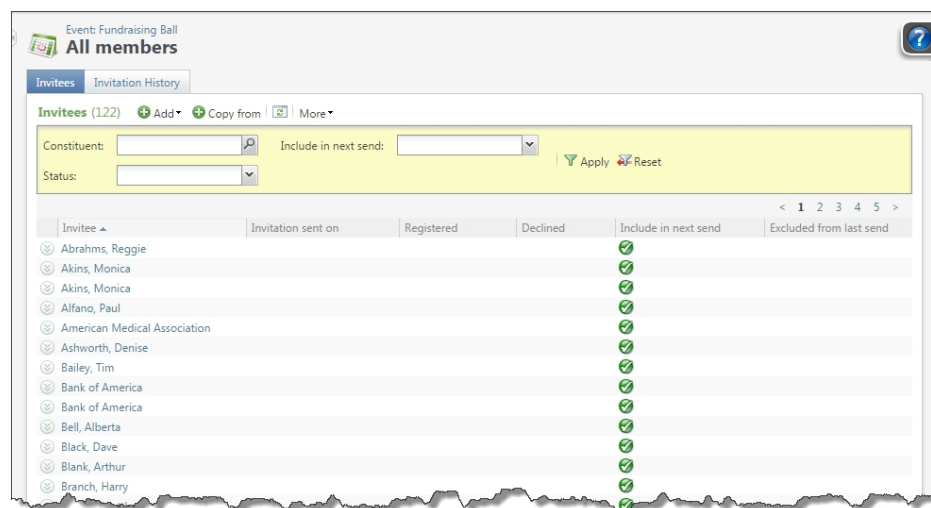
the effort to review the additional relationships. And, we want to ensure that you have the choice when to return thousands of relationships for a constituent. If a user does want to see all the relationships, individual WealthPoint screenings will continue to return all relationships.

Also, we added an indicator on the wealth and ratings record for constituents who have more network connections available from GuideStar. This indicator plus the initial information returned can help you decide if you want to run an individual WealthPoint screening. In addition, the known relationships will display at the top of the network connections list.

With these changes we can improve your WealthPoint group screenings without sacrificing the ability to see all relationships for a constituent. We hope these performance updates will improve your experience group screening constituents in WealthPoint.

## Invitation Lists

To make it easier to sort an invitation list on a special event record in alphabetical order, invitee names are now formatted as "Last name, First name."



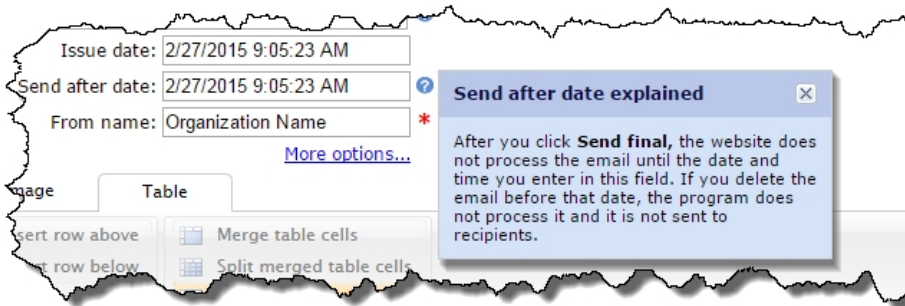
## Blackbaud Internet Solutions

### Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. **Blackbaud Internet Solutions** was automatically updated in this release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product.

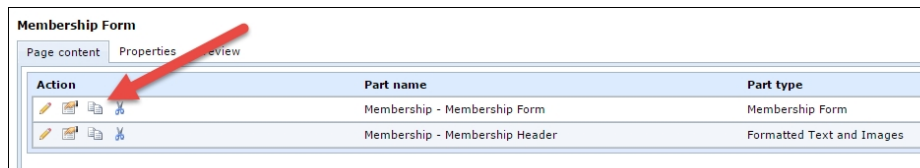
## Help Text in Email Messages

New help text is available for the **Send after** date field in *Messages* to explain that after you click **Send final**, the website does not process the email until the date and time you enter in the field. It also explains that if you delete the email before that date, the program does not process it and does not send it to recipients.



## Pages: Additional Copy Part Option

You can now copy parts from the Page content tab when you highlight a page in the list of pages. This change reduces the number of clicks required to copy parts when you navigate to them from the list of pages. Previously, you had to edit the pages to copy them or copy them from *Parts*.



## Part Search Filters

To help you quickly find the pages and parts you need, new search filters are available. From the Search tab, you can use the new **My content** or **Filter by template** options to narrow the results to pages you created or that use a specific template.

**Pages & templates**

[+ New page](#) [+ New template](#)

From Pages & templates, you create a

**Folders** **Search**

Page name, title or url contains:

Pages containing part type:

Page types to include:

Filter by template in use:

☐ My content

Site:

Main Site

[Search](#) [Clear](#)

Also, when you search for parts to insert on pages, the **My content** filter is available so you can limit the list to the parts you created.

Select a Part

Filter by folder: [Search all folders](#) Filter by type: All Filter by name:

Filter by site: Main Site ☐ My content [Filter](#)

Part name	Part type	Owner
Admin - Style Guide	Formatted Text and Images	Supervisor
Admin - Header Text	Formatted Text and Images	Supervisor

## Pages & Templates New Sort Options

You can now use **Page name** or the new **Last modified** column to sort the list of pages. These changes help you to quickly find the pages you need.

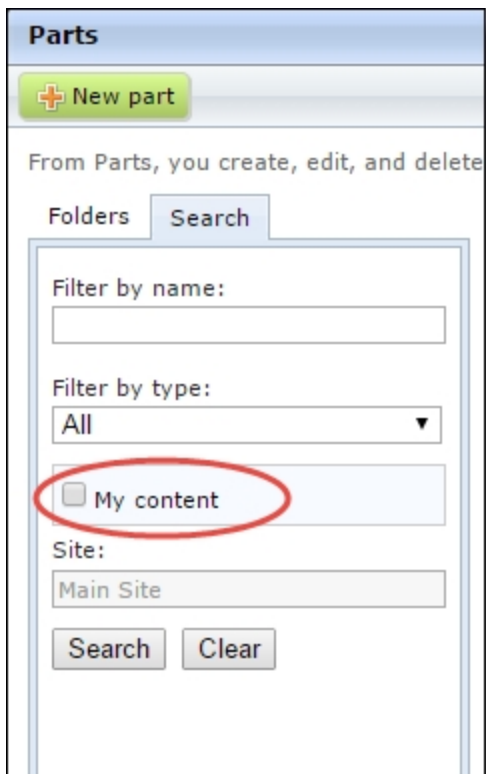
**Note:** When you sort the list, the pages appear in ascending order. Pages that begin with the letter A, or include the oldest changes, appear at the top of the list.



Action	Page name	Page type	Last modified
Authorization Failed		Page	8/12/2013 8:40:15 PM
Change User ID/Password Confirmation		Page	8/12/2013 8:40:15 PM

## Parts Search Filter

To help you quickly find the parts you need, a new search filter is available. From the Search tab, you can use the new **My content** option to narrow the results to parts that you created.



**Parts**

+ New part

From Parts, you create, edit, and delete

Folders Search

Filter by name:

Filter by type:

All

☐ My content

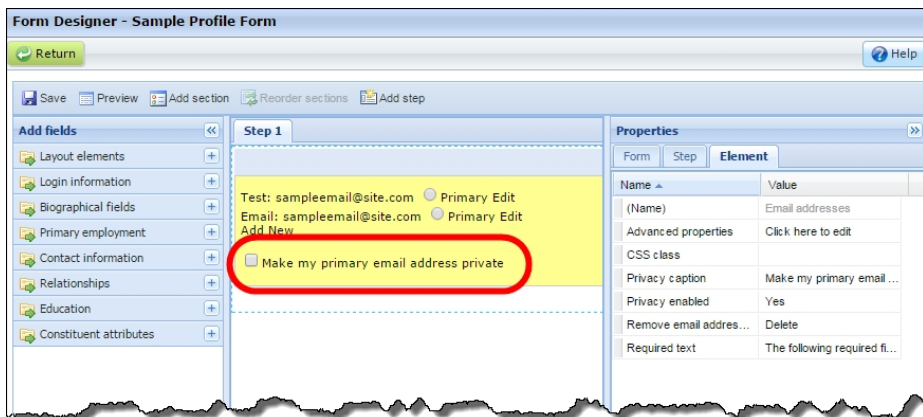
Site:

Main Site

Search Clear

## Profile Update Form

When you design the Profile Update Form for your **Blackbaud Internet Solutions** website, the **Email addresses** element under **Contact information** has changed. To improve email address privacy for website users, the new **Make my primary email address private** checkbox appears in the design area when you add the element to a form.

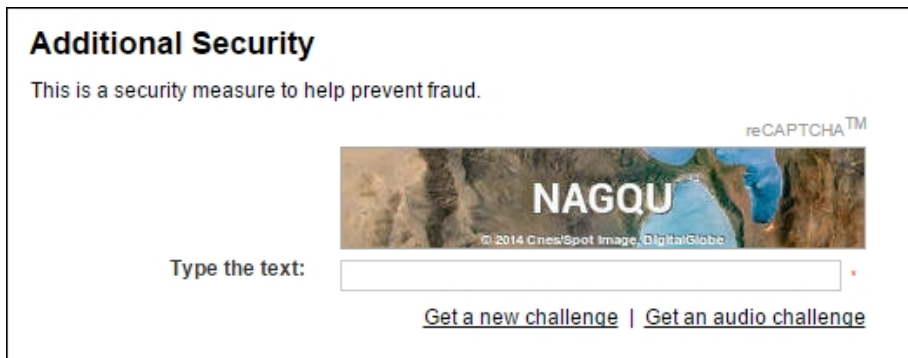


To display the checkbox on your web page so users can select whether to mark the primary email address as private, select "Yes" in the **Privacy enabled** row on the **Properties** pane. In the **Privacy caption** row, you can enter custom text for the checkbox to display on the page.

**Note:** When users select the new **Make my primary email address private** checkbox on your web page, it also designates their primary email address as private for the Directory and Profile Display parts on a web page.

## reCAPTCHA Instructional Text

New instructional text appears on forms that include reCAPTCHA images. Previously, the text instructed users to "type the two words" shown in the reCAPTCHA image. Now, the text instructs them to "enter the text" since the images typically include characters that do not form words.



## Site Administrators Filter for Users

Now when you use filters in *Users*, you can identify the people who are site administrators. Previously, you could only filter by the roles you added to your website. This change helps you quickly identify people with administrative access when you need to change rights, such as when a person is no longer employed by your organization.

Filter by back office link:

☐ Deleted ☒ Supervisor

Username	Last login
Supervisor1	

## Relationship Label for Additional Members in Membership Dues Batches

When a program level allows multiple members, the drop down under **Who else should be included on this membership** now includes relationship information. This helps you easily find the relationship between an additional member and a primary member on the Enter Membership Dues page. For example, when you add the spouse of a constituent as an additional member, "(Spouse)" appears as the relation next to their name in the **Name (Relation)** column. Also, the **Relationship** column on the Members and cards screen has been removed and the relationship information now appears in the **Name (Relation)** column.

Enter membership dues

Elizabeth A. Ashton

Summary - Batch # 193

Who else should be included on this membership?

Name (Relation)	Lookup ID	Remove
Dennis Ashton (Spouse)	8-10000117	<input type="button" value="Remove"/>

Are they also giving a donation?

☐ Add a donation of

Opportunity:  Campaigns: <None>

Designation:  Solicitors: <None>

Category:  Recognition: Dennis and Elizabeth A...

☐ Constituent declines Gift Aid for this donation

How are they paying?

☐ Do not receipt Tax deductible amount:  Total amount: **€500.00**

Update projected totals

Bill to	Total
Projected total	0
Current total	0
Projected amount	0.00
Current amount	0.00

Help Next Payment Clear Review Done

## Service Pack 3

These features were introduced in Service Pack 3 after the original **CRM 4.0** release.

## Block Sending Email Messages and Scheduled Email

Your System Administrator can now use the BlockAllEmails and BlockScheduledEmails settings to prevent inadvertently sending email messages and scheduled email from a test environment. To do this,



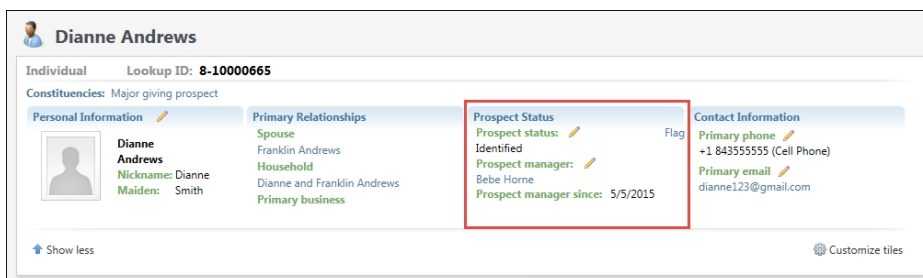
you must add `<add key="BlockAllEmails" value="True" />` and `<add key="BlockScheduledEmails" value="True" />` to the appSetting node in both web.config files for **Blackbaud Internet Solutions** and **Blackbaud CRM**. By default these settings do not appear in the file, and the default behavior is False.

**Tip:** The BlockScheduledEmails setting *only* blocks emails sent from the *Email, Scheduled emails* functional area. It does not block scheduled emails set to send when you use the **Send after date** field in *Messages* or *Marketing Efforts*.

**Note:** With this change, the ProcessCMSEmail.BusinessProcess.vb file has been updated for the Process CMS Email Business Process in **Blackbaud CRM**.

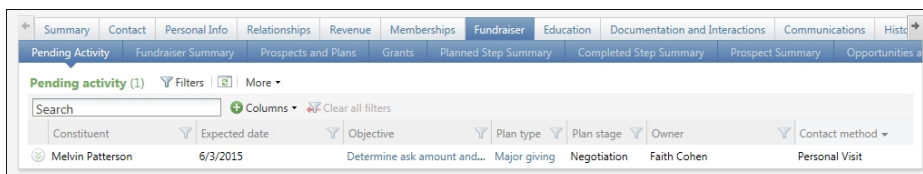
## Prospect Status Tile on Constituent Records

The constituent record now includes the Prospect Status Tile, which summarizes information for major giving prospects. You can view and edit a constituent's prospect information from the tile, including the prospect status and the prospect manager. From the Prospect Status Tile, you can also flag the prospect for tracking purposes.



## Pending Activity List Builder

To improve flexibility in managing pending activity information, the Pending Activity data list has been converted to list builder format to include more advanced options for sorting, navigating, and customizing information. You can access the Pending Activity list by clicking on the Pending Activity second-tier tab on the Fundraiser tab of the constituent record or by clicking the Pending Activity tab on the My Fundraiser page. For more information about list builder options, see the *General Features Guide*.



**Show me:** [Watch this video to learn how to opt into the Pending Activity list builder](#)

To opt into the Pending Activity list builder, you will need to turn on Design Mode by clicking **Toggle design mode on** while on the Fundraiser tab on the Constituent record or on the My Fundraiser page. Click **Edit Tabs** to edit the appearance of the Pending Activity second-tier tab and scroll down to Fundraiser to select the Pending Activity tab. In the **Section** field on the Tab properties screen, click the ellipsis button.

- To turn off the data list, select the data list in the Items grid, and click **Edit**. On the Edit sections screen, click the ellipsis button in the **Visible** field and select **False**.
- To turn on list builder format, select the Pending Activity list builder on the Edit sections screen, click the ellipsis button in the **Visible** field and select **True**.

# Service Pack 4

These features were introduced in Service Pack 4 after the original **CRM 4.0** release.

## Blackbaud Internet Solutions Middle Name Field

The Donation Form, Payment, and Payment 2.0 parts in **Blackbaud Internet Solutions** now include the **Middle name** field under **Additional fields**.

**Note:** This change satisfies the Canadian Revenue Agency's requirements for donation receipts.

**Additional fields**

Select the additional fields to display on the donation form.

Field	Include	Required
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>

## BBIS Event Registration Transaction Batch: Donor Option

When a website user submits an event registration on your **Blackbaud Internet Solutions** website and you process it in the BBIS Event Registration Transaction Batch in **Blackbaud CRM**, you can now select "Donor" in the **Registrant** column on the Guests tab when you view transaction details. Select this option when the donor submits their information as a guest instead of the primary registrant

Review transaction data

Address Payment Registrations **Guests**

View guest details

Registration option	Registrant	Name	Linked constituent	Linked constituent auto...
Adult	Donor			
Child	Donor	eci Roberts		Not auto-matched

New constituent  
Linked constituent  
Unknown guest

OK Cancel

You can also change the registrant from Donor to Linked constituent, New constituent, or Unknown guest.

**Tip:** Previously, you could select "Donor" in the ClickOnce version of **Blackbaud CRM**.

## PeopleFinder Phone Number Enhancements

We have added some address-related enhancements to *PeopleFinder* to help fix an issue with new addresses for constituents found by the *PeopleFinder* process. Previously, if the constituent already had an address in **CRM** marked as "Primary" and *PeopleFinder* returned a new address for the constituent, the primary address in **CRM** was no longer marked as primary and the address type was set to "PeopleFinder-former." The new address from *PeopleFinder* was added to the constituent and was marked as "Primary."

In order to offer more flexibility, we have added some additional options to the Edit *PeopleFinder* process options screen. On this screen, you can now choose whether or not to add new addresses from *PeopleFinder* to constituents at all. If you do, you can select the address type and information source to use for the new addresses. You can also choose the address type to use for the former primary addresses for constituents. In addition, you can choose whether or not to make the new addresses from *PeopleFinder* the primary ones.

**Edit PeopleFinder process options**

**Match confidence**

Only import constituent information that meets or exceeds this match confidence ranking: D-Possible match

**Name, phone, address, and deceased information**

If PeopleFinder returns a last name:

- ☒ Add the last name as an alias
- ☐ Replace the last name currently on the constituent record with the returned last name
  - ☐ Add the former last name as an alias
- ☐ Do nothing. I do not want to process last names returned by PeopleFinder

☒ Add new phone number from PeopleFinder

Phone type: [Dropdown]

Information source: PeopleFinder

☐ Mark the phone number from PeopleFinder as primary

☒ Add new address from PeopleFinder

Address type: [Dropdown]

Information source: PeopleFinder

Set address type on former address to: PeopleFinder-former

☒ Mark the address from PeopleFinder as primary

☒ If PeopleFinder determines that a constituent is deceased, mark the constituent as deceased and follow rules for life changes

Help Save Cancel

In order to support these changes, the PEOPLEFINDER process table in the **CRM** database has been updated with these additional columns: UPDATEADDRESS, OLDADDRESSTYPECODEID, NEWADDRESSTYPECODEID, NEWADDRESSINFOSOURCECODEID, and MARKADDRESSASPRIMARY. Existing *PeopleFinder* processes will remain unchanged; however, the Edit *PeopleFinder* process options

screen will have the new options. If you want to take advantage of these changes, you can edit the existing *PeopleFinder* process options.

## Constituent Tile SDK Enhancements

With the **CRM 4.0** release, we introduced constituent summary tiles ([Constituent Tiles on page 18](#)) to offer quick views of constituent information such as contact information, relationships, and memberships. With Service Pack 4, we introduce a more streamlined way to create and deploy new constituent tiles. For more information, see the [SDK documentation](#). If you already created custom constituent tiles on version 4.0 prior to Service Pack 4, your customizations will continue to work after you upgrade; however, we recommend you plan to upgrade your custom tiles to take advantage of the streamlined tile development and deployment process.

## Documentation Enhancement: Dependencies on Audit Tables

When the program processes certain features of the program, such as smart fields and reports, it is important to understand that these features may not process correctly when dependent audit tables are disabled or purged. Specific parameters determine when a feature is dependent on an audit table.

With this release, we enhanced the audit table content to more clearly identify audit tables with dependent fields. We now provide a list of fields that depend on audit tables for the following areas of the program:

- Smart Fields
- Constituents
- Revenue
- Marketing and Communications

To learn more about these audit table enhancements, see the [Security Guide](#).

## Service Pack 5

These features were introduced in Service Pack 5 after the original **CRM 4.0** release.

## Microsoft .NET Framework 4.5.2

With this release, **Blackbaud CRM** version 4.0 Service Pack 5 now requires .NET 4.5.2 to support the Transport Layer Security (TLS) 1.2 protocol for enhanced communication security over the Internet. Before you upgrade, you must upgrade all servers that run any component of **Blackbaud CRM** (such as database and web servers) to .NET 4.5.2. If you have any customizations, they will continue to work after the upgrade. However, if you edit a customization (or create a new one), you must update the target framework in the project properties to use .NET 4.5.2 before you recompile the customization. For more information, see the [SDK new features information](#).

## Delete Email Messages and Newsletter Issues Permanently

**Note:** With the 4.0 Service Pack 8 release, a new **Automatically delete email older than** option appears on this setting for you to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years. For more information about this feature, refer to [Delete Email Messages and Newsletter Issues Permanently](#).

To improve performance and delete email messages and newsletter issues in bulk, you can now run a process to permanently delete these from your database. In *Email*, when you delete an email message or newsletter issue, it only soft deletes. When you soft delete email, it removes from the user interface, but the data remains in the database. To delete this email permanently from the database, schedule the new **Delete email permanently** organization setting in *Administration*.

To schedule the frequency and other options for the process, navigate to the setting under **Schedules**.

Under **Frequency**, you schedule a day and time frequency to run the process to permanently delete email messages and newsletter issues in the **Every [ ] day(s) at [ ]:[ ]** fields.

**Tip:** To prevent the program from running this process, select **Never**. By default, this is selected when you upgrade to this version.

Under **Options**, you enter the number of minutes to allow the process to run and you also enter the number of days to retain soft deleted email messages and newsletter issues in your database so that the remainder of your soft deleted email deletes permanently during the process.

### Important Tips

- To prevent the possibility of anyone scheduling the **Delete email permanently** setting, your System Administrator can use the ShowEmailDelete web.config setting to remove it from the Schedules tab. By default, the setting is `<add key="ShowEmailDelete" value="True"/>`. To remove it from the tab, enter False.
- To run the process as efficiently as possible, we recommend you schedule it to run after hours when users are less likely to access Blackbaud Internet Solutions and Blackbaud CRM.

**Note:** If you schedule this process and the **Email jobs** process to run at the same time, please be aware your email job process may experience a delay.

- Depending on the volume of email you need to permanently delete, the process can exceed the amount of time you enter in this field. When this occurs, the process pauses and starts again according to the interval you scheduled in the **Every [ ] day(s) at [ ]:[ ]** fields.

For example, you need to run this process for the first time. Due to the high volume of email to initially delete, you can schedule it to run every night (1 day) at 1 AM for 300 minutes (5 hours). The process runs longer than 300 minutes so it pauses until the next night at 1 AM. At that time, it starts again for the next 300 minutes.

- To determine the email that remains soft deleted and the email that deletes permanently, the program compares the sent date of the email to the number you enter in the **Delete email that is older than [ ] day(s)** field. It is important to consider this as you determine the number of days to enter in this field.

For example, today's date is March 15 and you enter "90" in this field. Email that was sent on January 15 remains soft deleted in your database. However, email that was sent on November 15 deletes permanently.

## Email Updates in Blackbaud CRM

To learn more about changes in Blackbaud CRM after you permanently delete email messages and newsletter issues, review this section.

- **Constituent Record** - Before you permanently delete email using this process, email messages and newsletter issues on a constituent record in Blackbaud CRM appear with a link beside the **Subject** field. You can click this link to open the message in Blackbaud Internet Solutions. After you run this process, the link disables beside the **Subject** field because you can no longer open it in Blackbaud Internet Solutions. Also, if a recipient opens an email after it has been deleted permanently, submits a donation from one, or clicks links in it, the **Opened**, **Donated**, and **Links clicked** fields do not update to reflect this information. The data that appeared in these fields when it was deleted from your database remains in place. For historical purposes, the other data, such as **Email name** and **Date sent**, also remain on the constituent record.

In Blackbaud CRM, email message and newsletter issue information displays on the Communications second-tier tab on the Communications tab.

- **Appeal Record** - Blackbaud Internet Solutions email for an appeal appears in the **Blackbaud Internet Solutions emails** grid on the Mailings tab of an appeal record in Blackbaud CRM. After you run this process, the calculations for an email, such as response rate and the number of click throughs, no longer updates. However, the data at the time the email is permanently deleted remains in the grid.
- **CMS Delete Email Business Process** - From *Administration, Business processes* in Blackbaud CRM, you can open the CMS Delete Email Business Process to view details about each instance of this process. To do this, on the Business Processes page, select the History tab. In the **Process type** field, select CMS Delete Email Business Process and click **Apply**. The processes appear in the grid below for you to view details such as the status of the process and the date and time the process ended.

For more information about records and processes in Blackbaud CRM, refer to the [Blackbaud CRM help file](#).

## Advanced Donation Form - Pledge Installments API

When you use the Advanced Donation Form to create a custom donation web page, **Blackbaud Internet Solutions** now includes API end points for pledge installments. Pledge installments are the payments a donor makes for a pledge according to a defined time schedule. These end points allow you to capture pledge and installment information, and they also allow you to tokenize a credit card for future pledge installment payments.

**Note:** The pledge installments API offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this feature. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, refer to the [Developer Guide](#). If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- payment.Gift.PledgeInstallment.NumberOfInstallments (integer)
- payment.Gift.PledgeInstallment.InstallAmount (number)

Recurrence for these new end points uses these existing end points.

- payment.Gift.Recurrence.Frequency
- payment.Gift.Recurrence.DayOfMonth
- payment.Gift.Recurrence.Month
- payment.Gift.Recurrence.StartDate

Also, two new javascript functions are now available.

- getRecurringGiftInstallmentAmount(totalGiftAmount, numberOfInstallments)  
This calculates the price of each installment for a recurring gift based on the number of installments the website user wants to make.
- getRecurringGiftLastPaymentDate(numberOfInstallments, frequencyCode, installmentStartDate, installmentMonth, installmentDayOfMonth)  
This calculates the end date of a recurring installment based on the number of installments the website user wants to make.

## Service Pack 6

These features were introduced in Service Pack 6 after the original **CRM 4.0** release.

## Credit Card Updater Service

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



- from contact details to credit card information.

With Service Pack 6, we introduce **Blackbaud Merchant Services™** Credit Card Updater - a subscription service that helps you maintain accurate credit card data for your recurring giving. With Credit Card Updater, you can:

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

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

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

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

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

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

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

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

## Enable/Disable Credit Card Updater

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

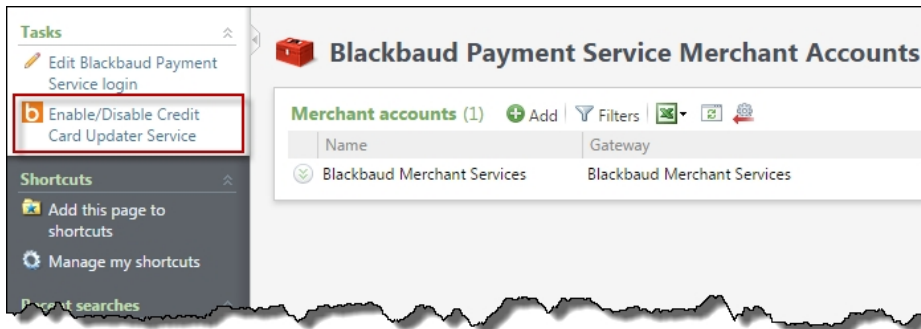
**Warning:** Credit Card Updater should be enabled *only* in your Production environment. You should not attempt to test in Staging, Development, or other non-Production environments. Credit Card Updater has no test mode as it updates your live credit card data, and is unrelated to your **Blackbaud Merchant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



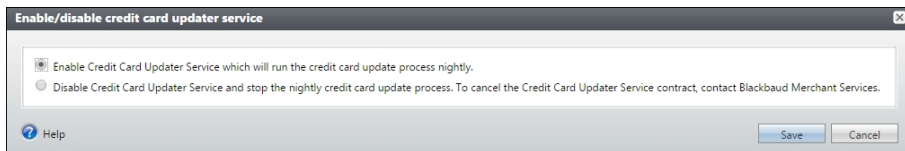
After you refresh a non-Production environment, immediately ensure that Credit Card Updater is set to disabled in the refreshed, non-Production environment to prevent the business process from running at night.

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

**Tip:** Enabling and disabling Credit Card Updater is associated with the same security set as editing the **Blackbaud Payment Service** login.



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



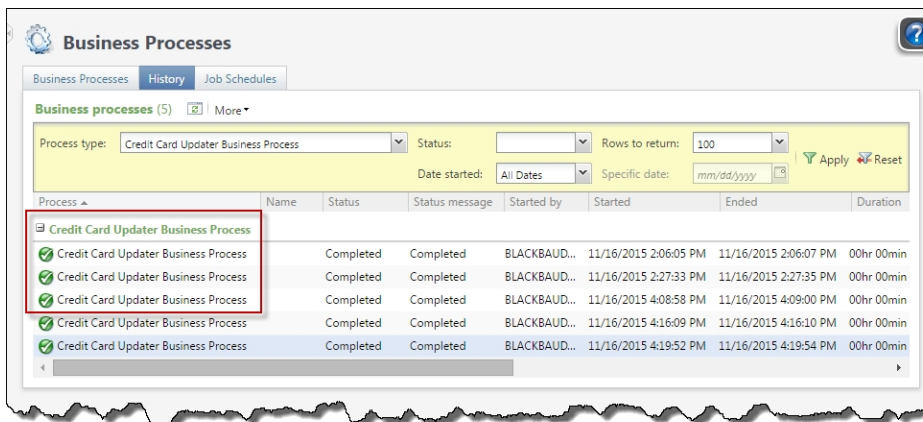
- When you select to enable the Service, the "Credit Card Updater" business process is automatically created. This process, which runs nightly, registers and deregisters cards in **CRM**.
- When updates are made to credit cards associated with pledges, recurring gifts, and membership installment plans, the **Credit Card Updated** field appears on the record and displays the month and year that the card information was updated. You can use the "Credit Card Updates" query to help you track changes made by the Service.
- When you select to disable the Service, the "Credit Card Updater" business process no longer runs nightly. To cancel the Service contract, contact **Blackbaud Merchant Services** at [bbms@blackbaud.com](mailto:bbms@blackbaud.com).

## Credit Card Updater Business Process

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

After you enable Credit Card Updater from the Blackbaud Payment Service Merchant Accounts page in *Revenue*, the "Credit Card Updater" business process is automatically created and scheduled to run

nightly. To view details about processes as they run, from the Business Processes page in *Administration*, click the History tab. From the **Process type** field, filter by "Credit Card Updater Business Process."



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

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

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

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

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

## ➤ What does the business process register?

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

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

**Note:** If you have more than one revenue commitment, such as a pledge or recurring gift, with the same credit card and at least one of them is included in the Credit Card Updater process, all of the revenue records with that credit card will be updated with the updated card information regardless of the status of the commitments. For example, a canceled recurring gift would still receive updated card

information if the same card was used on another active revenue commitment. The Credit Card Updater process charges by the number of unique credit cards updated, not by the number of revenue records that are updated. In this case, your organization is charged for one updated card even though multiple revenue records are updated.

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

### ➤ What does the business process deregister?

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

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

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



## Revenue Records


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

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

Kyle N. Bell  
**11/11/2014 Recurring gift: \$1,987.00**

Transaction summary

**\$1,987.00**  
 Monthly  
  
**Active**  
 Edit status

Next installment: **12/11/2015 (#2)**  
 Last payment: **11/11/2015 (#1)**  
 Date started: 11/11/2015  
 Total paid: \$2,000.00  
 Payment method: Credit card - last 4 digits  Edit  
 Card type: Visa  
 Name on card: Kyle N. Bell  
 Last 4 digits: 4522  
 Expires on: 11/2019  
**Credit Card Updated: 12/9/2015**


Activity Details Benefits Recognition Solicitors Letters Attributes Documents

For pledges and membership installment plans, the field appears on the Details tab.



Details

Details

Original amount: \$25.00 Send reminders: Yes  
 Subtype: Revenue reference:  
 Source code: Effort:  
 Inbound channel: Appeal:

Designations (1)  More ▾

Designation	Amount
Campaign for Excellence	\$0.00

Payment information  Edit 

Automatic payment: Yes  
 Payment method: Credit card Card type: Discover  
 Card number: \*\*\*\*\*7510 Expires on: 9/2020  
 Name on card: Simon Snow **Credit Card Updated: 11/16/2015**

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

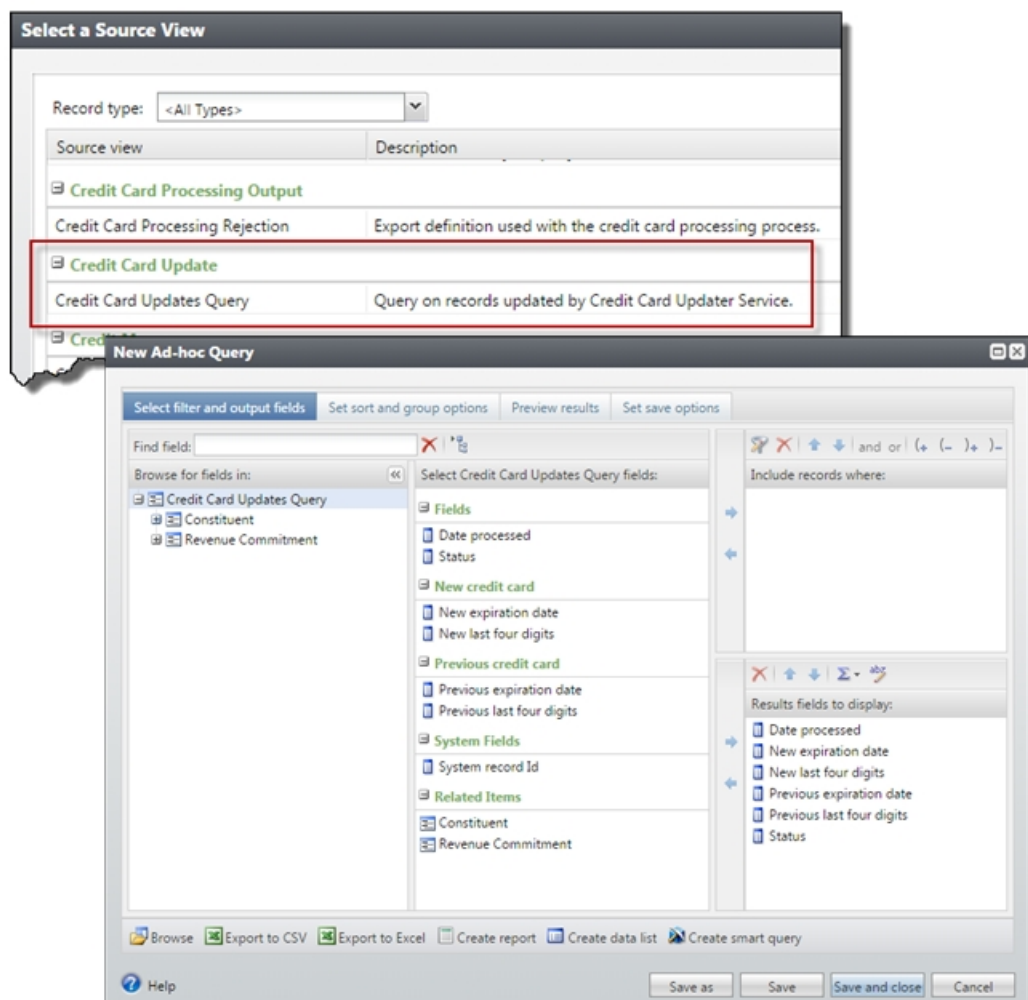
**Tip:** In some cases, you may need to manually update credit card information after the business process runs. For example, a donor calls your organization to provide a new expiration date which

requires you to manually update the card's expiration date in the program. When this occurs, the manual edit you make on the revenue record overrides the last update made by the business process. At this point, the program removes the **Credit Card Updated** field from the revenue record as well as the Credit Card Updates query. The field is added back only when a future update is made by the business process.

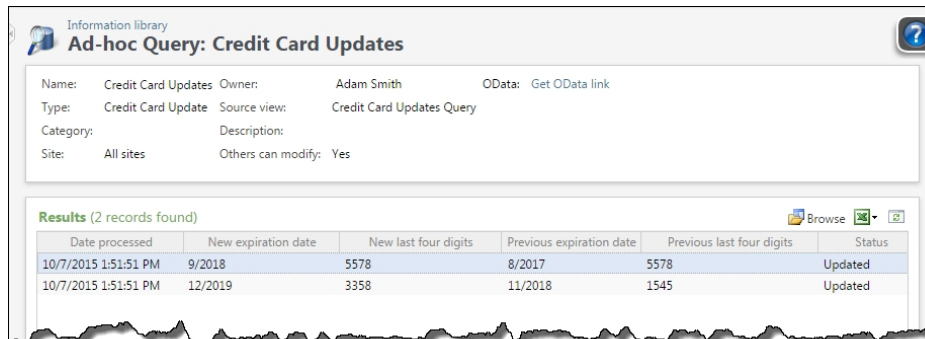
## Credit Card Updates Query

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

**Note:** When you upgrade to **Blackbaud CRM 4.0** Service Pack 6, all system roles with access to the "Credit Card Processing Rejection" query are initially granted access to the new query. This query is visible even when Credit Card Updater Service is disabled.



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



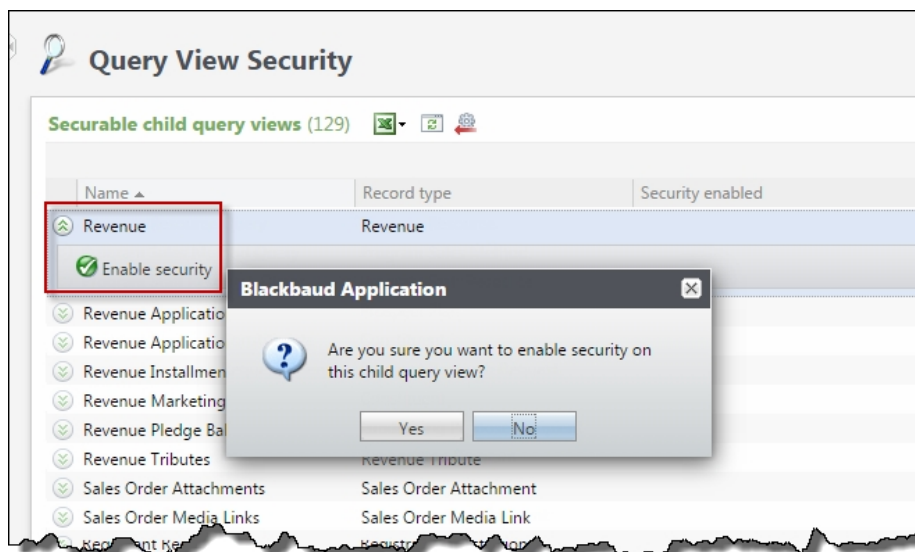
Date processed	New expiration date	New last four digits	Previous expiration date	Previous last four digits	Status
10/7/2015 1:51:51 PM	9/2018	5578	8/2017	5578	Updated
10/7/2015 1:51:51 PM	12/2019	3358	11/2018	1545	Updated

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

## ➤ Site Security

To ensure that site security works properly for the Credit Card Updates query, you must enable security for the Revenue query. To enable security, from *Administration*, on the Security page, click **Query view security**.

From the **Securable child query views** list, click "Revenue." From the action bar that appears, click **Enable security**.



Once you enable site security for the Revenue query, site security is processed by the **Revenue Commitment** child node in the Credit Card Updates query. Only users with security rights to a site associated with the revenue can view details of the revenue.

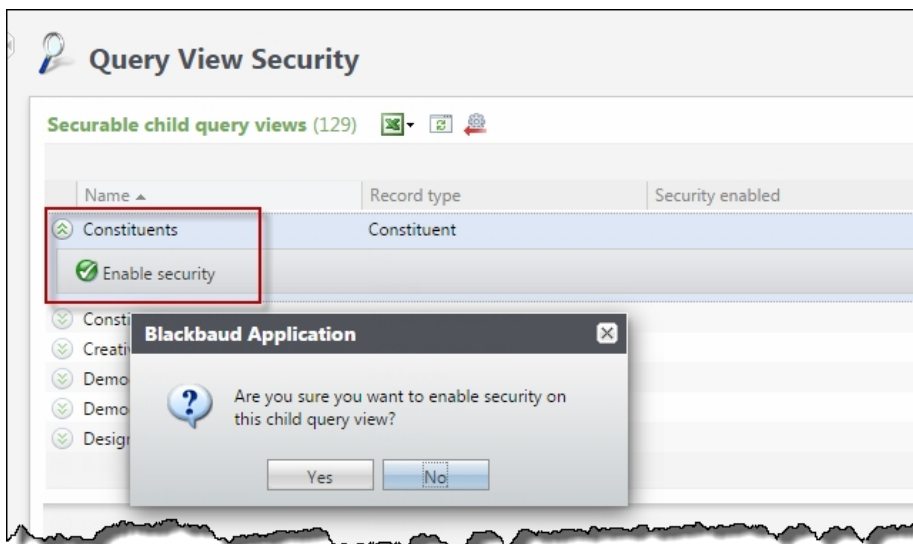
**Note:** Users can view the credit card update record, including date and status, but no other details specific to the revenue appear.

When the query is filtered by any information on the revenue record, such as "Revenue Commitment\Revenue record criteria is not blank," credit card update results linked to that revenue only display when users have rights associated with that revenue.

## ➤ Constituent Security

To ensure that constituent security works properly for the Credit Card Updates query, you must enable security for the Constituents query. To enable security, from *Administration*, on the Security page, click **Query view security**.

From the **Securable child query views** list, click "Constituents." From the action bar that appears, click **Enable security**.



Once you enable site security for the Constituents query, site security is processed by the **Constituent** child node in the Credit Card Updates query. Only users with security rights to the constituent associated with the update can view constituent details.

**Note:** Users can view the credit card update record, including date and status, but no other details specific to the constituent appear.

When the query is filtered by any information on the constituent record, such as "Constituent\Constituent record criteria is not blank," credit card update results linked to those constituents only display when users have rights associated with those constituents.

## Responses from Blackbaud Merchant Services

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

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

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

## Blackbaud Secure Payment Page Upgrade

To provide an optimal check out experience for **Blackbaud Internet Solutions** website users on multiple devices, you can now upgrade your static Blackbaud secure payment web pages to responsive web pages. You can select to upgrade each secure payment page individually, or you can upgrade all pages, across all of your websites, at the same time.

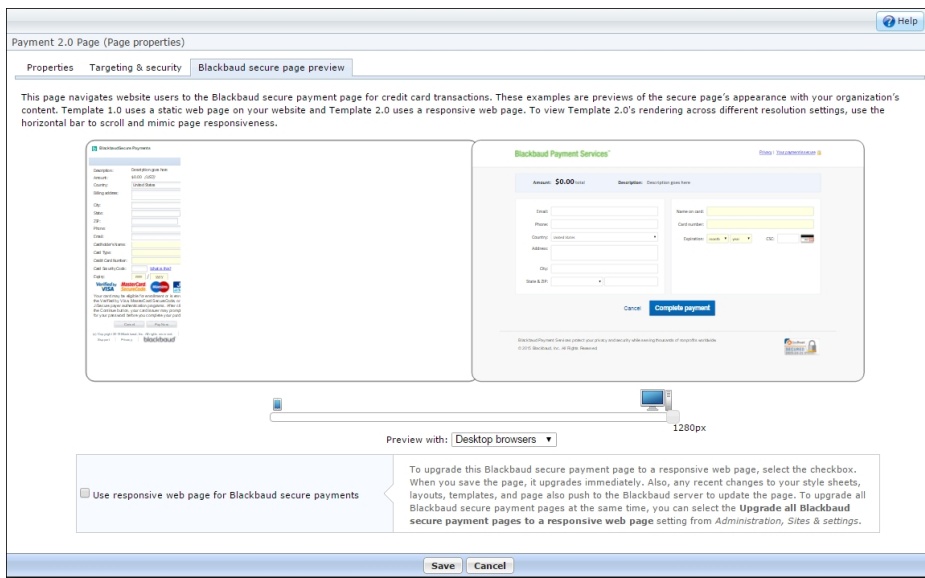
**Note:** The Blackbaud secure payment page processes credit cards only; it does not process direct debits. This functionality has not changed between the static and responsive web page upgrade.

After you upgrade Blackbaud secure payment pages from static to responsive, you cannot use static pages again.

### Upgrade an Individual Secure Payment Page

In *Pages & templates*, the new Blackbaud secure payment preview tab appears from page properties when the page contains a part that integrates with the Blackbaud secure payment page. For example, if the page contains a Payment 2.0 part that uses the Blackbaud secure payment page, the tab appears.





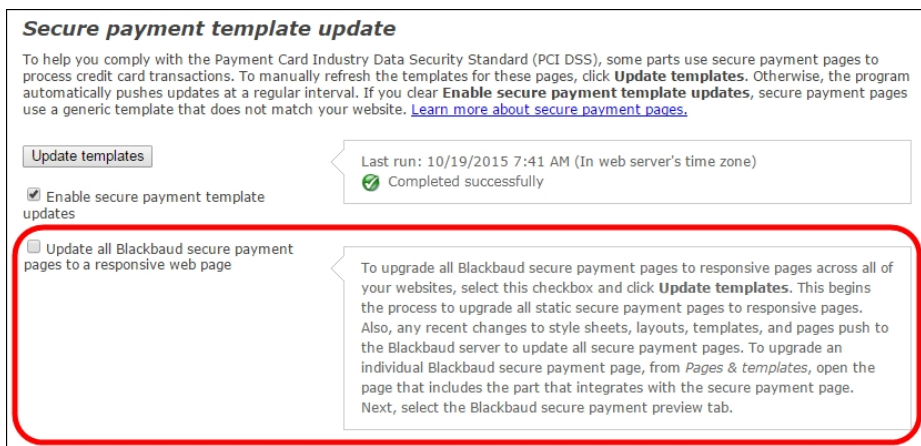
The template examples that display on the tab are previews of the secure payment page's appearance with your organization's content. Template 1.0 displays a preview of the existing static page. Template 2.0 displays a preview of the responsive page after you upgrade.

**Tip:** Use the horizontal bar to scroll and mimic page responsiveness for Template 2.0. You can also toggle the template examples between the desktop and mobile style sheet associated with the page, select the browser option in the **Preview with** field.

To upgrade the Blackbaud secure payment page to a responsive page, select **Use responsive web page for Blackbaud secure payments**. When you save the page, it upgrades immediately. Also, any recent changes to your style sheets, layouts, templates, and page also push to the Blackbaud server to update the page.

## Upgrade All Secure Payment Pages, Across All Websites

In *Administration, Sites & settings*, the new **Update all Blackbaud secure payment pages to a responsive web page** checkbox appears under the **Secure payment template update** setting.



When you select this and click **Update templates**, the process begins to upgrade all static secure payment pages to responsive pages. Also, any recent changes to style sheets, layouts, templates, and pages push to the Blackbaud server to update all secure payment pages.

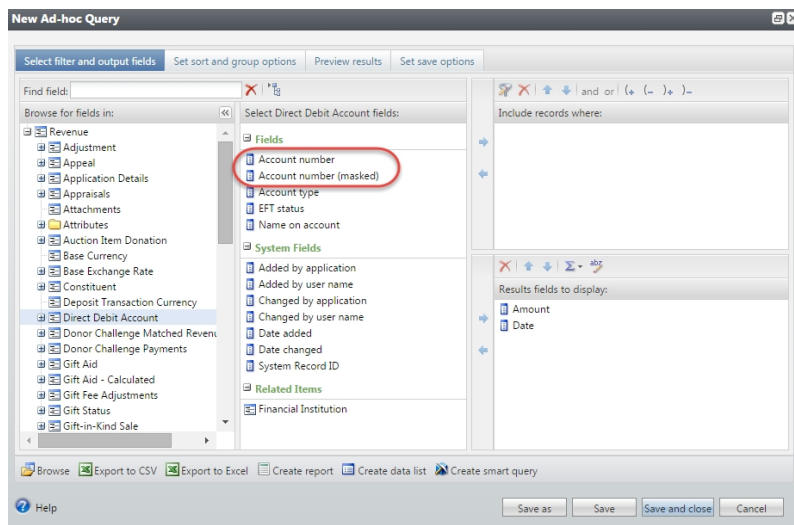
## Anonymous Gift Information in Payment 2.0 Parts

The Payment 2.0 part in **Blackbaud Internet Solutions** now includes information about whether a donation is given anonymously. This information appears in the Payment 2.0 part shopping cart items list, the Payment 2.0 part confirmation page receipt grid, and the Payment 2.0 part acknowledgement email receipt grid.

## Masked Account Number Field in Queries

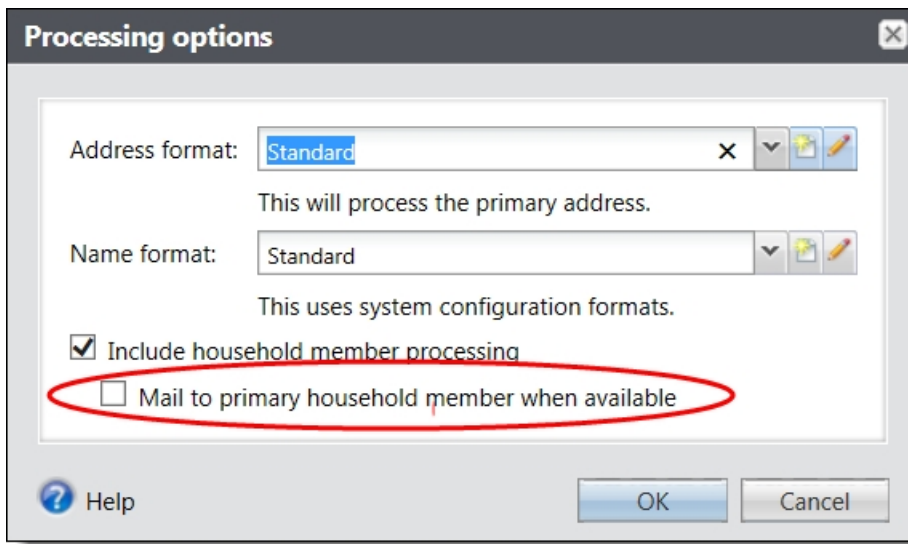
We have added a new field in queries for masked account numbers. The existing field **Account number** on the Direct Debit Account node in queries displays the entire account number. When used in printed materials such as acknowledgement letters, this could result in security issues if an entire account number is included. To offer an alternative, we have added the field **Account number (masked)**, which masks the account number except for the last four digits (for example, \*\*\*\*5678).

To take advantage of this new field in existing queries that include account numbers, you must edit the queries and change the selected field from **Account number** to **Account number (masked)**. You can continue to use the **Account number** field for situations in which you want the entire account number to appear.



## Correspondence Processes for Households and Members

General correspondence processes in *Marketing and Communications* under Manage Correspondence now have a checkbox to **Mail to primary household member when available**. When you add or edit a correspondence process, you can click **Edit** in the **Output format** field and mark a new **Mail to primary household member when available** checkbox on the Processing options screen.



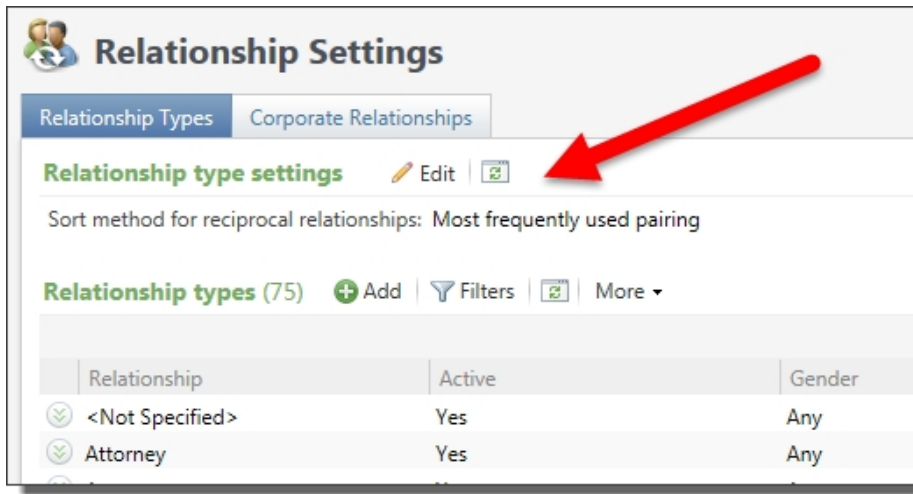
When the new checkbox is marked, if the household has one or more members, the addressee and salutation information for the correspondence will be that of the primary household member instead of the information for the household itself. This makes the address and name format options more consistent with those available on communication templates for direct marketing efforts.

After you upgrade, the new **Mail to primary household member when available** option will be available for new and existing general correspondence processes but, by default, will not be marked. In order to take advantage of the new functionality, you will need to edit existing general correspondence mailings and mark the checkbox after you upgrade.

## Sort Order for Reciprocal Relationship Types

We have added a new sort order for use when editing the relationship types between two constituents. Previously, when a constituent had a relationship with a commonly used relationship pair (such as employee and employer) and you tried to edit the relationship, the "Edit relationship" screen could take a long time to load in databases with extremely large numbers of relationships between constituents, as the program was trying to calculate which relationship pairs were the most common between your constituents.

To improve performance, we have added the ability to change the functionality so that the sort order for relationships in those relationship fields is alphabetical instead of being sorted with the most commonly used relationship pair at the top of the list. However, when you change the sort order to alphabetical instead of "Most frequently used pairing," the reciprocal relationship will not default automatically to the reciprocal relationship field. The new **Sort method for reciprocal relationships** setting is on the Relationship Types tab of the Relationship Settings page which you access from the **Relationship settings** configuration task in *Constituents*.



**Note:** After you upgrade, the new setting will be set to "Most frequently used pairing" to match the current behavior. In order to see the performance improvements, you must change this setting to "Alphabetical" instead.

## PhoneFinder and Do Not Mail Addresses



The PhoneFinder process in the Data Tune-up section of *Administration* now has an **Include addresses marked as Do Not Mail** checkbox on the "Edit PhoneFinder submit process" screen. This gives you the flexibility to choose whether or not to include those records. If you have many constituents who do not receive mail from your organization, you may still want to use addresses that are marked as "Do not mail" to help locate new or updated phone numbers for those constituents. However, if you use "Do not mail" to also indicate invalid or out-of-date addresses, you may not want to use those in the PhoneFinder process.

By default, this checkbox is marked to match existing behavior. In order to omit these addresses from the PhoneFinder process, you must edit existing PhoneFinder submit processes and unmark the **Include addresses marked as Do Not Mail** checkbox.

**Edit PhoneFinder submit process**


**Select constituents**


☒ All constituents

☐ Selected constituents:   

☐ Include inactive constituents

**Address types**


Individuals:  


Organizations:  

☐ Include incomplete addresses

☒ Include addresses marked as Do Not Mail

**Phone types**

Individuals:  


Organizations:  

**Results**

☐ Create selection from results

Selection name:

☐ Overwrite existing selection

 Help

## Improved Matching in the Incremental Constituent Duplicate Search Process

With this enhancement, we have improved the "Incremental Constituent Duplicate Search Process" located in **Duplicates** which you access from *Constituents*. Previously, two constituents with addresses that were almost identical were sometimes not seen as duplicates by the process. The issue occurred when one address included a five-character postal code and the other included the ZIP+4 postal code with all other address information matching exactly.

To correct this issue, we added a new field to the "Custom settings" tab of the "Edit incremental duplicate constituent search process" screen. The **Number of characters to use for matching** field allows you to specify how many characters of the postal code to compare for the match criteria. The default for the new field is 12 but you can change it to suit the needs of your organization. If the value of this field is set to five, for example, the five-character postal code and the ZIP+4 postal code will now be seen as exact matches since only the first five characters are compared. A higher number represents a more stringent match criteria.

The screenshot shows the "Edit incremental duplicate constituent search process" dialog box with the "Custom settings" tab selected. The "Postcode matching" section is highlighted with a red box. It contains a dropdown menu labeled "Number of characters to use for matching:" with the value "12" selected. Other settings visible include "Required name confidence level to match:" (Low (70%)), "Required address confidence level to match:" (Low (70%)), "Required overall confidence level to match:" (Low (70%)), "Pre-filter addresses by" (State, Postcode, Country), and "Include options" (Include inactive, Include deceased, Include groups, Include organizations).

## Organization Setting: Non-Production Environment Checkbox

From *Administration, Sites & settings*, you can now select **This is a non-production environment** when you want to test or disable specific functionality in an environment that is not available to website users and email recipients. When this checkbox is clear, your environment is live and set to Production.

The screenshot shows the "Settings" page with the "General settings" tab selected. The "Non-production environment" checkbox is highlighted with a red box. The checkbox is currently unchecked. The text next to it says: "To apply a limited number of settings to a different environment that you use for testing, select the checkbox. [Learn more about environments.](#)" Other settings visible include "Organization name:" (Blackbaud), "Update user role:" (0), and "Enable CRM security for linked CMS users:" (unchecked).

**Tip:** When you upgrade to this version, the checkbox is *not* selected and your website remains in your Production environment. If you do select the checkbox, the setting applies to each website you host, whether it is one site or multiple sites.

Currently, there are two features you can alternate between Production and Non-production environments. The following table lists the feature and what you can do in each environment.

Feature	Non-production	Production
<b>Secure payment template update</b> organization setting	When you update Blackbaud secure payment pages from static to responsive pages, a copy of each page template is created for you to view and test in the Non-production environment. This avoids interruption on your live, Production site.	When you update Blackbaud secure payment pages from static to responsive pages in Production, the pages are live on all of your live websites.
<b>Email jobs</b> organization setting	Disable email jobs sent from the <i>Email, Scheduled emails</i> functional area.  <b>Tip:</b> The Non-production environment does not prevent an email job from sending to recipients when you use the <b>Send after date</b> field in <i>Messages</i> or <i>Marketing Efforts</i> .	Blackbaud Internet Solutions sends messages for email jobs from the <i>Email, Scheduled emails</i> to recipients as expected.

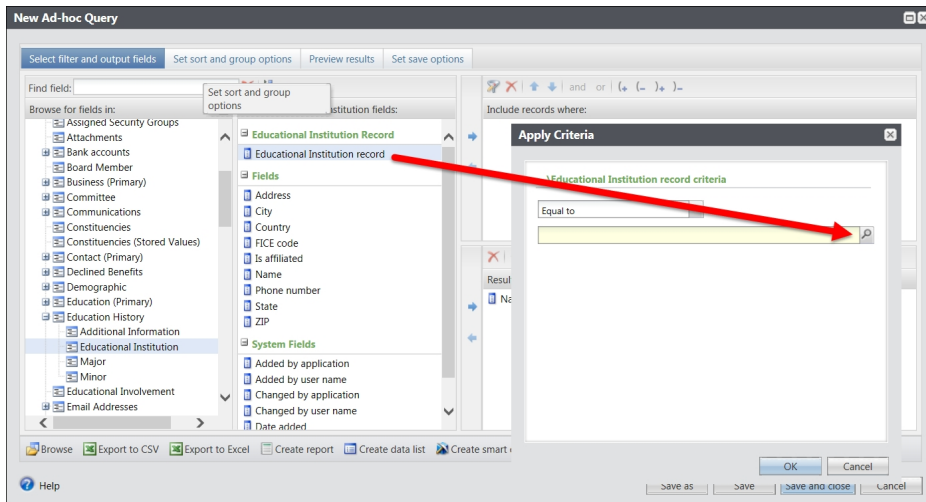
## Delete Constituent Images with the "Delete audit data" Global Change

The "Delete audit data" global change now includes the option to select "Constituent images." When you add or edit profile pictures for constituents, each instance of the image is saved to the constituent audit tables, which can take up an unexpected and unwanted amount of space in the database. Now when you run the "Delete audit data" global change, you can specify to also delete constituent images from the audit tables. The images are not deleted from the constituent records, just from the audit tables. Existing "Delete audit data" global changes remain the same after you upgrade. In order to take advantage of the new setting, you must edit existing "Delete audit data" global changes and mark "Constituent images."

## Educational Institution Enhancement in Constituent Query

In constituent queries, we have added the "Educational institution record" field under Constituents > Education History > Educational Institution. Now, when you include the new "Educational institution record" field in a query, you can search for and select the exact educational institution to use.

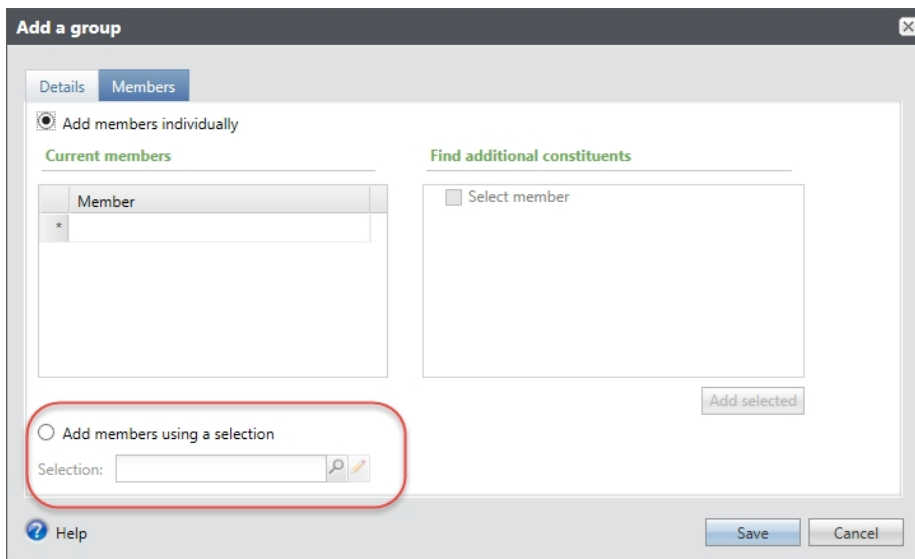




Previously, you could use only the "Name" field under Constituents > Education History > Educational Institution, which relied on you entering the exact name of the institution, rather than searching for and selecting one. This resulted in potentially inaccurate or unintended results in the query in addition to potential performance issues. Existing queries will remain unchanged when you upgrade; however, you may consider whether or not to modify them to use the new "Educational institution record" field for more accurate results and better performance.

## Add Constituents to a Group in Bulk

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



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



**Note:** This feature is secured separately so that you can decide which system roles and users have rights to do this. There is no undo for this feature nor is there "delete group members in bulk" functionality, so set security for this feature carefully.

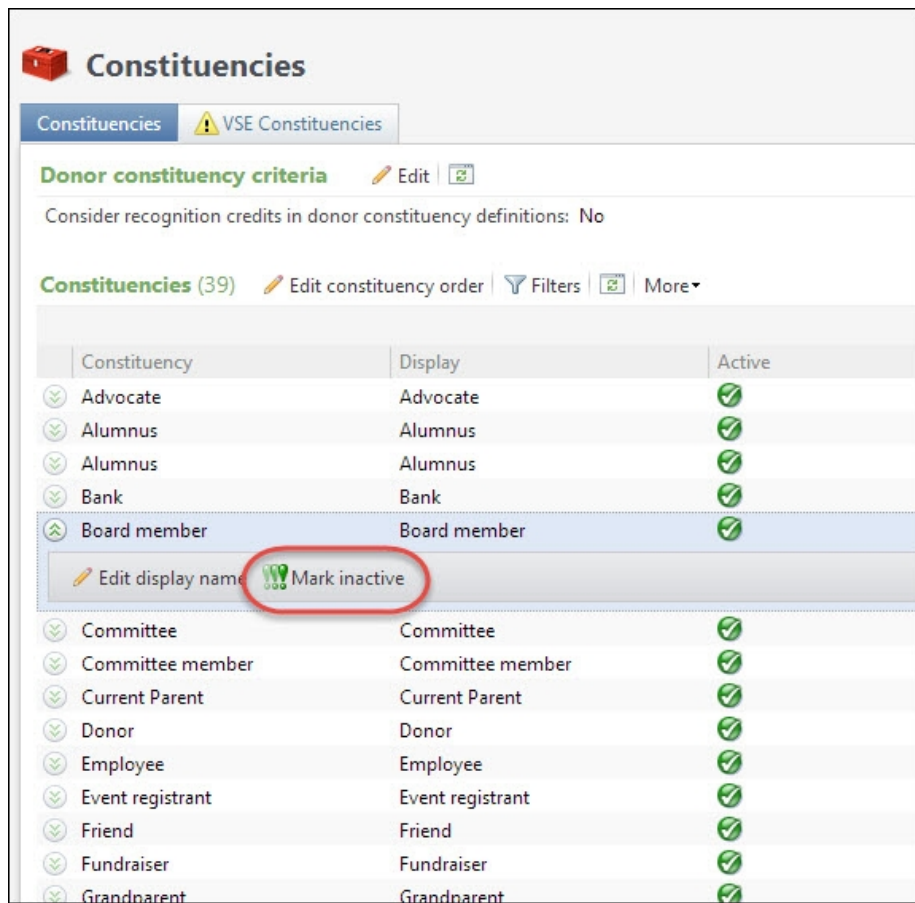
**Note:** When someone in a selection is already an active member of the group, nothing changes with the group member. When someone in a selection is a previous or inactive member of the group, the constituent becomes an active group member again and start date for the constituent's group membership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

## Mark Constituencies Inactive

You can now mark constituencies as inactive. Inactive constituencies are not available to assign to constituents and do not appear as filters in queries and reports. They will also be considered inactive for the Data Warehouse and will not be included in the ETL refresh process. When you inactivate constituencies you no longer need, you can improve system performance because processes such as queries do not need to consider data that is no longer relevant to your needs.

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

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



**Constituencies**

Constituencies ⚠ VSE Constituencies

**Donor constituency criteria** ✎ Edit 📄

Consider recognition credits in donor constituency definitions: No

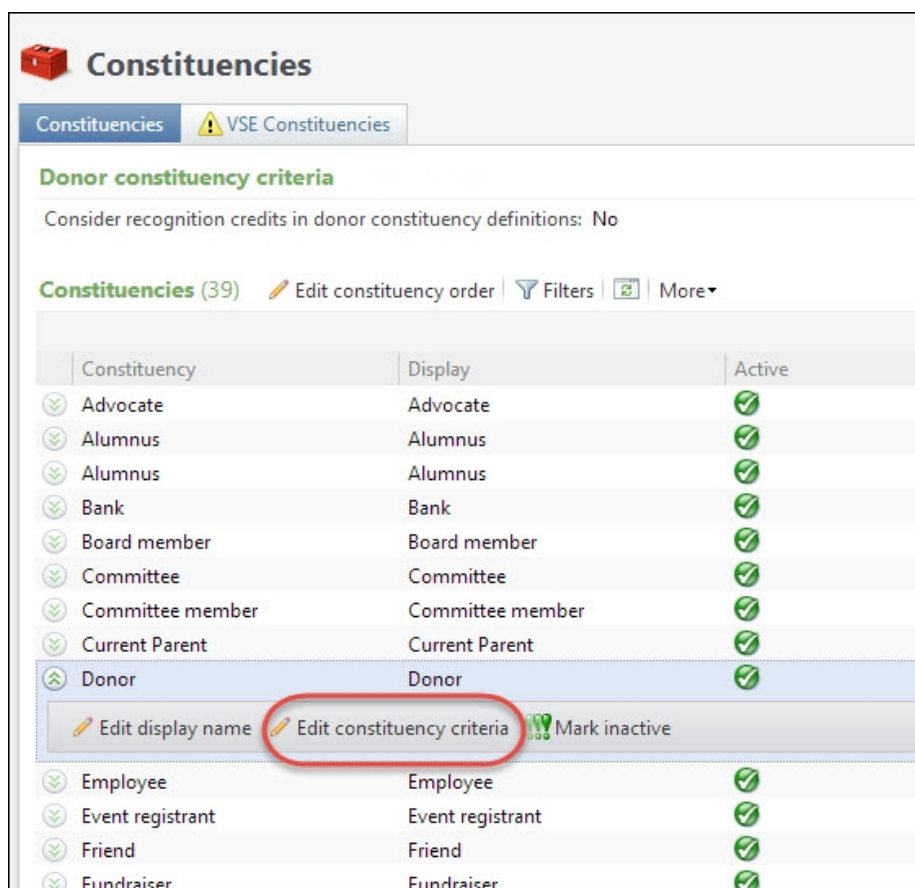
**Constituencies (39)** ✎ Edit constituency order 🏠 Filters 📄 More▼

Constituency	Display	Active
Advocate	Advocate	✓
Alumnus	Alumnus	✓
Alumnus	Alumnus	✓
Bank	Bank	✓
Board member	Board member	✓
✎ Edit display name 🚫 Mark inactive		
Committee	Committee	✓
Committee member	Committee member	✓
Current Parent	Current Parent	✓
Donor	Donor	✓
Employee	Employee	✓
Event registrant	Event registrant	✓
Friend	Friend	✓
Fundraiser	Fundraiser	✓
Grandparent	Grandparent	✓

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

## Donor Constituency Criteria

We have made some design changes to the way you manage constituency criteria in the Constituencies page. Previously, you managed this information from the Donor constituency criteria section of the page. Now, you manage criteria directly from the constituencies themselves. For constituencies that allow criteria settings, which include Donor, Loyal donor, and Major donor, you can now expand the constituency and click **Edit constituency criteria**.



**Constituencies**

Constituencies ⚠ VSE Constituencies

**Donor constituency criteria**

Consider recognition credits in donor constituency definitions: No

**Constituencies (39)** ✎ Edit constituency order 🔍 Filters 📄 ⌵ More

Constituency	Display	Active
Advocate	Advocate	✓
Alumnus	Alumnus	✓
Alumnus	Alumnus	✓
Bank	Bank	✓
Board member	Board member	✓
Committee	Committee	✓
Committee member	Committee member	✓
Current Parent	Current Parent	✓
Donor	Donor	✓
<span style="color: orange;">✎</span> Edit display name <span style="color: orange;">✎</span> Edit constituency criteria <span style="color: green;">⚠</span> Mark inactive		
Employee	Employee	✓
Event registrant	Event registrant	✓
Friend	Friend	✓
Fundraiser	Fundraiser	✓

This new option displays an edit screen for that constituency only.



**Edit constituency criteria** ✕

☒ Constituent has given in recent years

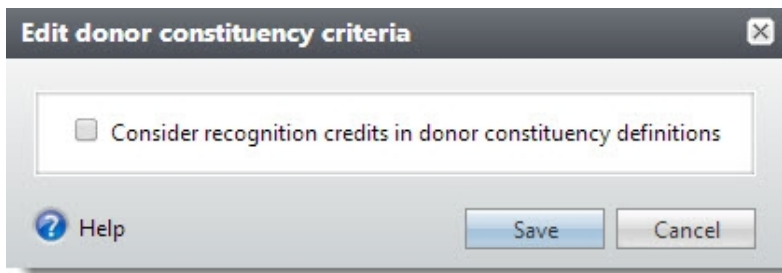
Years:

☐ Constituent has given since a specific date

Date:  📅

Since you can now mark a constituency as inactive from the constituency itself, this is also where you manage the donor criteria specific to that constituency, when applicable.

To determine whether to include recognition credits in constituency definition calculations, you still click **Edit** on this page. The new Edit donor constituency criteria screen appears.



To manage constituencies criteria, from *Constituents*, click **Constituencies** under Configuration.

## Constituencies Performance Improvements

In order to improve system performance and usability, we have redesigned how the program handles constituencies.

### Constituency Stored-Value Refresh Process

We have added a constituency refresh process to the maintenance tasks available in *Constituents*. In order for constituencies to be applied correctly when you run a query on constituencies, you must run this process on a regular basis. We recommend that you schedule this process to run daily. In addition, when you reactivate constituencies that you had previously marked as inactive, the reactivated constituencies are not applied to records until you run the refresh.

To run the process, from *Constituents*, click **Constituency stored-value refresh processes**. On the Constituency Stored-Value Refresh Processes page, click **Add**. The Add a constituency stored-value refresh process screen appears.

The stored constituency values are also available in the Blackbaud Data Warehouse.

**Add a constituency stored-value refresh process**

Name:

Description:

**Criteria**

Constituencies:

- ☒ Alumnus
- ☒ Bank
- ☒ Board member
- ☒ Committee
- ☒ Committee member
- ☒ Donor
- ☒ Event registrant
- ☒ Fundraiser
- ☒ Grantor
- ☒ Loyal donor
- ☒ Major donor
- ☒ Major giving prospect
- ☒ Matching gift organization

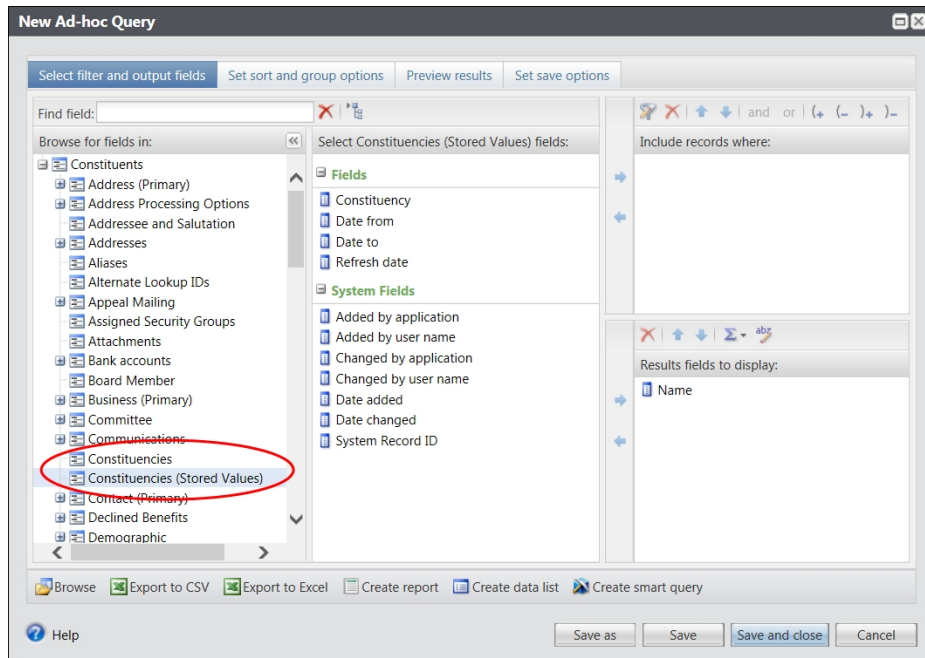
Selected constituents:

After you enter a name and description, select the constituencies you want to refresh, including user-defined constituencies. You can use a selection to select specific constituents to apply the refresh to, or leave the **Selected constituents** field empty to apply the constituency refresh to the entire database. Click **Save**.

## Query on Constituencies

We have added a new node to *Query* which uses the new stored values for constituencies in order to help the performance of query processing. The new Constituencies (Stored Values) now is available for you to use, in addition to the existing Constituencies node. The existing Constituencies node still calculates constituency values when the query is processed. Some constituencies, such as "Major donor" are calculations based on criteria you specify, so those calculations can take more time to process. The new Constituencies (Stored Values) node simply returns the constituency values that were calculated the last time you ran the "Constituency stored-value refresh process." You can include the **Refresh date**

when you use to the new node in order to make sure the constituencies from the refresh process are recent.



## User-Defined Constituencies Global Changes

The "Add user-defined constituency" and "Delete user-defined constituency" global changes update constituent records with the user-defined constituencies you specify. User-defined constituencies are set up under Code Tables in *Administration*. For example, if you have a user-defined constituency of "Neighbor," you could add it automatically to all constituents with a local postal code.

The "Delete user-defined constituency" global change removes these constituencies when a constituent no longer meets the criteria you defined. Now, when you run the global changes, the constituencies are updated as they are when you run the "Constituency stored-value refresh process" from *Constituents*. The global change processes automatically refresh the appropriate records in your database, so that the constituencies in the "Constituency (Stored Values)" node of a constituent query are updated.

## Service Pack 7

These features were introduced in Service Pack 7 after the original **CRM 4.0** release.

## Refund Details

With this release, when you issue a refund for a credit card transaction, you can now view refund details on the Details tab of the payment record as well as the Reconcile transactions and disbursements page in *Treasury*. We also added a new query to help you further review refund information.

### ➤ Details Tab on a Payment Record

When a refund is issued, a new **Credit Card Refunds** section appears on a payment record and displays the date and amount of the refund.

**Lisa Haas**  
11/12/2015 Payment: \$0.00

**Transaction summary**

Payment amount: \$0.00	Date: 11/12/2015
Receipt amount: \$0.00	Batch number:
Gift fees: \$0.00	Revenue ID: rev-10002165

**Status**

Acknowledgements: Not acknowledged  
 Receipt preference: Per payment  
 Receipt status: Not receipted  
 Receipt date:  
 Receipt number:  
 Post status: Not posted  
 Post date: 11/12/2015  
 Post process ID:

**Payment method**

Payment method: Credit card  
 Card type: Visa  
 Card number: \*\*\*\*\*1111  
 Name on card: Lisa Haas  
 Expires on: 12/2019  
 Authorization code: 831000

**Details** | Benefits | Matching Gifts | Letters | Documentation | GL Distributions | Tributes | Lockbox

**Credit Card Refunds (4)**

Date	Amount
11/12/2015	\$5.00
11/12/2015	\$5.00

**Note:** The ability to issue a refund for a credit card transaction by editing or deleting an individual payment (not in *Batch*) is existing functionality. As a reminder, refunds are only possible when the gateway that processed the credit card (such as **Blackbaud Merchant Services**) supports refunds. For information about issuing a refund, refer to [Refund Credit Card Transactions](#).

### ➤ Reconcile Transactions and Disbursements Page

From the Reconcile transactions and disbursements page in *Treasury*, refunds are now reflected on the View by transaction tab. The original amount of the payment is shown as a separate row with any refunds for that original charge shown in subsequent rows. This allows you to easily view the amount of the original charge in addition to the refunds.

**Reconcile transactions and disbursements**

✓ The file '2015-03-11' uploaded on 11/13/2015 was successfully processed.

View by CRM transaction | View by disbursement | Unmatched disbursements | Suspect charges | Card chargebacks

CRM card transactions by date

Show: Pending transactions  
Transactions for: This week  
Gateway ID: <All gateway IDs>

Apply Reset

Transaction date	Card type	Cardholder name	Authorization code	Last 4 digits	Amount	Status
11/12/2015	Visa	Lisa Haas	831000	1111	\$5.00	Pending
11/12/2015	Visa	Lisa Haas	831000	1111	(\$5.00)	Pending

✓ Mark reconciled | Gateway details

Transaction details

Revenue ID: rev-10002165  
Constituent: Lisa Haas  
Treasury deposit:  
Date: 11/12/2015

For transactions processed through **Blackbaud Merchant Services**, click a transaction to expand its row and display an action bar. Click **Gateway details** to view refund details.

- Gross amount = refund amount
- Fee = zero
- Net amount = refund amount

**Gateway details**

Transaction details

Card holder: Lisa Haas  
Date: 11/12/2015  
Card: Visa  
Gross amount: (\$5.00)  
Currency: USD

Source: Refund  
Donor IP:  
Account: \*\*\*\*\*1111  
Fee: \$0.00  
Disbursal: Disbursed

Expiry: 12/1/2019  
Net amount: (\$5.00)

Result details

Result: Approved  
Reference No.: 4473361900555000001518  
Gateway result: Successful transaction.

Gateway result code:

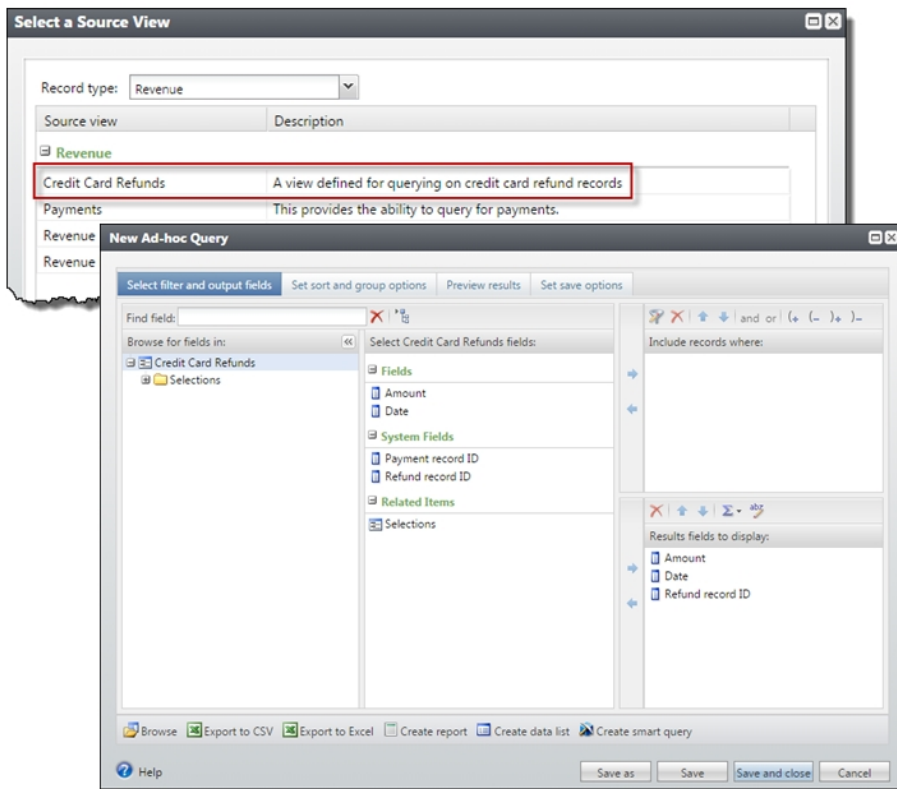
Help Close

## ➤ Credit Card Refunds Query

We added a new "Credit Card Refunds" query to help you review refund details. You can use fields such as **Amount**, **Date**, **Payment record ID**, and **Refund record ID** to quickly locate refund details



associated with credit card transactions.

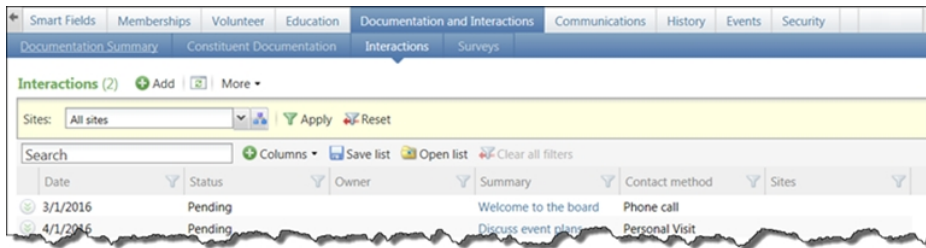


## Invitee and Invitation Information in Constituent Query

We have added the ability to query on event invitees by invitation lists in constituent queries. You can now use the new "Constituents>Invitees" node which can sort or filter the results by invitation list. If you have any existing queries using the "Constituents>Invitee" node and you would like to sort or filter by invitation list, you should modify them to use the new "Constituents>Invitees" node.

## Improved Constituent Interactions List

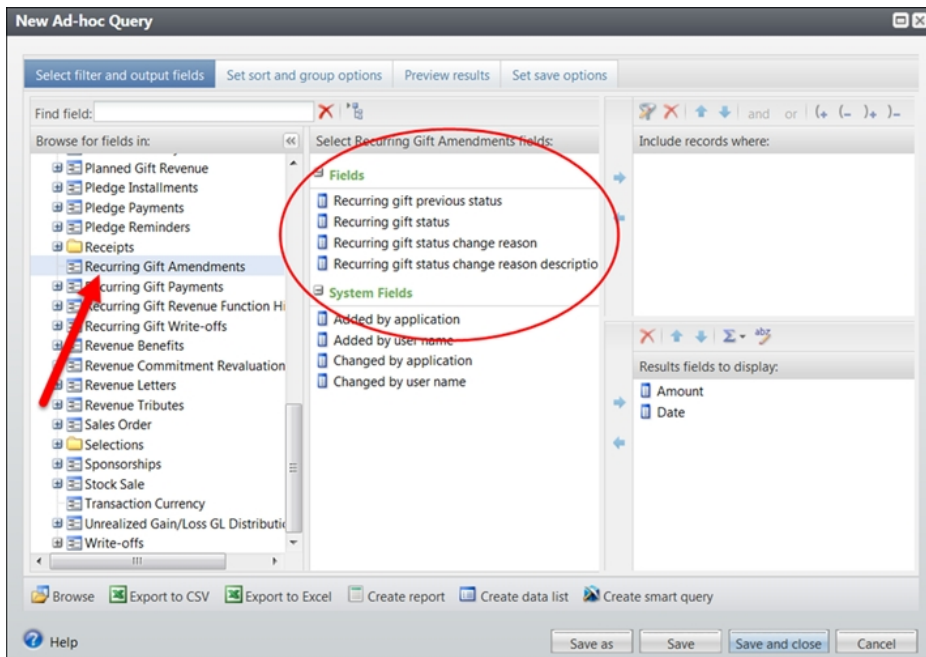
To improve flexibility in managing interaction information for individual constituents, the Interactions data list has been converted to list builder format to include more advanced options for sorting, navigating, and customizing data in the list. Group and household constituents already use a new list builder format. You can access the Interactions list builder on the Interactions sub-tab on the "Documentation and Interactions" tab of a constituent record.



In order to opt-in to the Interactions list builder for individual constituents, you will need to access design mode by clicking the **Toggle design mode on** button in the upper right corner of the program. On a constituent record, click **Edit tabs** in the design mode view at the top of the record. On the Edit page tabs screen, find the Interactions tab and edit it. Go to the Sections field. There will be two list builders shown: one for groups and one for individuals. The one for groups will already have the "Visible" setting set to "`=CBool(Page.Fields!ISGROUP)`" and that should remain unchanged. Change the "Visible" setting for list builder for individual constituents to "`=Not CBool(Page.Fields!ISGROUP)`" and the data list "Visible" setting to "False."

## Recurring Gift Status Information in Query

We have added the ability to query on recurring gift status activity in revenue queries. We have added the "Revenue>Recurring Gift Amendments" node to revenue queries with the "Recurring gift previous status," "Recurring gift status," "Recurring gift status change reason," and "Recurring gift status change reason description" fields. You can edit existing queries to include these new fields.

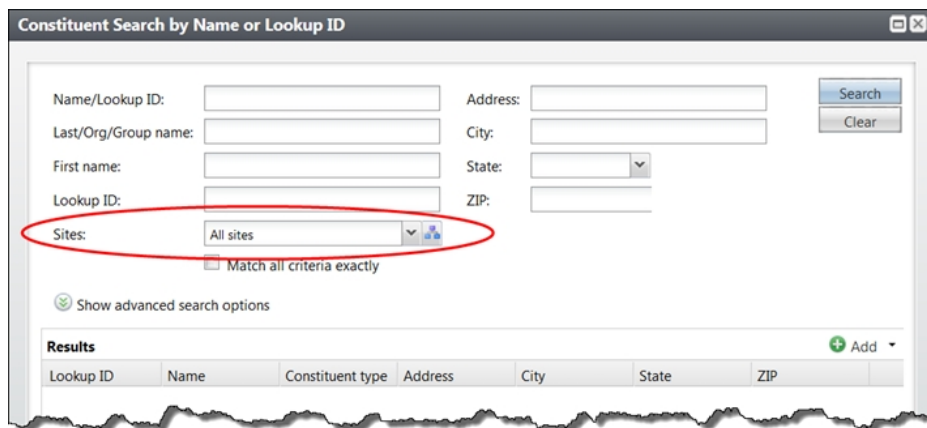


## Constituent Summary Tiles Enhancement

When you make changes to a constituent record to "Show more" or "Show less" of the constituent summary of the record which includes the constituent summary tiles, the program remembers your settings the next time you open a constituent record. This is not a system-wide setting, but instead is specific to each user.

## Search for Constituents by Site

We have added the **Site** field to several constituent search screens so that you can further refine your search parameters. The updated search screens include: Constituent Search, Constituent Search by Name or Lookup ID, Committee Search, and the corresponding search screens in batches, when available.



The screenshot shows a web application window titled "Constituent Search by Name or Lookup ID". The window contains several input fields for searching constituents. The "Sites" dropdown menu is highlighted with a red circle, showing "All sites" as the selected option. Other fields include "Name/Lookup ID:", "Last/Org/Group name:", "First name:", "Lookup ID:", "Address:", "City:", "State:", and "ZIP:". There are "Search" and "Clear" buttons. Below the search fields, there is a checkbox labeled "Match all criteria exactly" and a link "Show advanced search options". At the bottom, there is a "Results" section with a table header: "Lookup ID", "Name", "Constituent type", "Address", "City", "State", and "ZIP". A green "Add" button is also visible.

## Smart Field Categories

We have added the ability to assign categories to smart fields. When you add or edit a smart field, you can now choose to assign a category to it.

**Add constituent appeal count smart field**

General Parameters Site filtering

**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

Value groups:

Values greater than or equal to	Value group name

Help Save Cancel

You can define your categories to best suit the needs of your organization. You can then sort or filter smart fields by category on the Smart Fields page under *Administration* to help you navigate the list more easily.

To sort or filter by category, you use the new **Category** column, which now appears on the list by default. In addition, we have added the columns **Created by** and **Created on** to this list, which you can also use for sorting or filtering smart fields. These two columns do not appear on the list by default, but you can add them by clicking **Columns** and selecting them.

## Improved Options for Global Marriage Settings in Constituents

We have added two new settings to the **Global rules for married constituents** section on the Marriage tab of the Manage Life Changes page. To access this page, click **Manage life changes** under **Configuration** in *Constituents*.



You can now select whether or not to have the primary phone number and email address automatically copied to a spouse's constituent record when you create the spouse relationship. Previously, when you added a spouse, all primary contact information (address, phone number, and email address) was copied from the existing constituent to the spouse record. Now, based on the new "Global rules for married constituents" settings, the primary phone number and email address may or may not be automatically copied to the spouse's record depending on your configuration settings. The primary address, however, is always copied to the spouse record.

By default, the new **Copy primary phone number to spouse's record** and **Copy primary email address to spouse's record** checkboxes are marked. If you do not want this information copied to spouse records, you can change these configuration settings.

## Service Pack 8

These features were introduced in Service Pack 8 after the original **CRM 4.0** release.

## Email Settings

You can now easily indicate whether to send multiple or single copies of emails from **Blackbaud Internet Solutions** when two or more constituent records include the same email address. This setting eliminates the need for you to remove duplicates before you send emails.

To send one email to multiple constituents with the same email address, clear the new **Send a unique email to each constituent who shares the same email address** option in *Sites & settings*. You typically select this when you want constituents, such as spouses, who share email addresses to each receive a copy of messages.

<input checked="" type="checkbox"/> Send a unique email to each constituent who shares the same email address	<p>When multiple constituents share the same email address, select this checkbox if you want each constituent to receive emails to that address. If the email includes merge fields, the message for each recipient is unique and populates with that constituent's information. When you do not select the checkbox, only one copy of the email is sent to the address, and any merge fields populate with information for the constituent whose record has been in <b>Blackbaud CRM</b> the longest.</p>
---	--

**Note:** This checkbox is selected by default. You do not need to clear it if you want the program to continue to send emails to each constituent.

This setting applies to constituents in an email list with a data source of Constituent or Imported. When you clear the checkbox, merge fields populate with information for the constituent whose record has been in the database the longest. When you select the checkbox to send a unique email to each constituent, merge fields populate with each constituent's specific information.

## Delete Email Messages and Newsletter Issues Permanently Update

As a follow up to the new **Delete email permanently** organization setting in **Blackbaud Internet Solutions Administration** (released in version 4.0 Service Pack 5), you can now select to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years. This enhancement automatically deletes email from the *Email* area of **Blackbaud Internet Solutions** and the back end of the database.

**Tip:** For more information about the original implementation of this setting, refer to [Delete Email Messages and Newsletter Issues Permanently](#).

To delete email permanently based on age, schedule the new **Automatically delete email older than** option.

**Delete email permanently**

In *Email*, when you select to delete an email message or newsletter issue, it no longer appears in the user interface, but the data remains in the database. To improve performance and permanently delete these messages from the database, schedule the options for this setting. If you do not want to delete these messages, select **Never** for both options.

To run the process as efficiently as possible, we recommend you schedule this to run after hours when users are less likely to access **Blackbaud Internet Solutions** and **Blackbaud CRM**.

Automatically delete emails older than:

☒ Never ☐ Days Last run: 4/30/2015 2:15 PM (In web server's time zone)  
Completed successfully

Business process frequency:

☒ Never ☐ Every 1 day(s) at 2:00 AM

Options:

Do not allow for process to run more than 30 minutes

To delete email older than a certain age, select the second option. In the field beside it, enter the number of days, months, or years to delete email, and then select an option in the drop down. For example, to delete email older than two years, enter "2" in the field and select Years.

**Delete email permanently**

In *Email*, when you select to delete an email message or newsletter issue, it no longer appears in the user interface, but the data remains in the database. To improve performance and permanently delete these messages from the database, schedule the options for this setting. If you do not want to delete these messages, select **Never** for both options.

To run the process as efficiently as possible, we recommend you schedule this to run after hours when users are less likely to access **Blackbaud Internet Solutions** and **Blackbaud CRM**.

Automatically delete emails older than:

☒ Never ☐ 2 Years Last run: 4/30/2015 2:15 PM (In web server's time zone)  
Completed successfully

Business process frequency:

☒ Never ☐ Every 1 day(s) at 2:00 AM

Options:

Do not allow for process to run more than 30 minutes

When you use this setting, the program calculates the age based on the email sent date. The process then deletes the applicable email from *Email* before deleting it from the back end of the database. If you leave the default as **Never**, the program only removes email from the back end of the database.

**Note:** To prevent the program from running the **Delete email permanently** process, it is important to remember that you select **Never** under **Business process frequency**. This is part of the original feature that released with Service Pack 5. Also, as a result of this new **Automatically delete email older than** feature, the **Delete email that is older than [ ] day(s)** field has been removed from this setting.

## Service Pack 9

These features were introduced in Service Pack 9 after the original **CRM 4.0** release.

## Appeals for Payments in Enhanced Revenue Batch

With this enhancement, when you add a payment toward an existing commitment in Enhanced Revenue Batch, the appeal associated with the commitment is now defaulted onto the payment. However, if you add an appeal for a payment to the batch row before you select the application, the appeal will not be changed. Also, if the batch template has a default appeal, the appeal from the template is used as the default.

## Add Constituent Attribute Global Change Enhancement

We have added the ability to use the "Add constituent attribute" global change process to add more than one instance of the same attribute category but a different attribute value to a constituent record. For example, you might want to assign an attribute category of "Distinguished Alum" with a value of "Athletics," as well one with a value of "Academics" to a graduate who earned honors in both areas.

This can occur only when the attribute does not have the **Allow only one per record** setting marked and when the global change process does not have the **Overwrite existing value** setting marked.

## Title Settings

In **Blackbaud Internet Solutions**, organization settings now includes the **Titles** section so you can filter the options that appear from the **Title** drop down field on web pages. Previously, all the titles from **Blackbaud CRM** appeared in the list. Use this feature to remove titles that are not frequently selected by website users, such as General and Chief.



When you upgrade to this version and view the new setting, all active titles from **Blackbaud CRM** appear with each checkbox selected. To make a title unavailable for your site, clear its checkbox and click **Save** on the General tab.

Titles you do not select are only available on your website when users are logged in and their profiles include existing titles that do not appear in the drop down list. In those instances, the program adds the titles to their form drop down lists.

**Note:** If your website includes custom JavaScript to restrict **Title** field drop downs, we recommend you test these fields on your site after you install this version. It is possible you no longer need this customization.

## User Login Part: Constituent Attributes

In **Blackbaud Internet Solutions**, the User Login part now includes the ability to change the order of the constituent attributes appearance on the form and modify their labels. Under **Attributes**, click and drag the dotted button on the far left to move an attribute in the updated grid. To change the label text, enter it in the **Caption** field.

These updates provide flexibility so you can specify how the attributes should appear on the form, such as if you want them in the same order as they are arranged in **Blackbaud CRM**.

**Attributes**  
Select which constituent attributes will display during the user registration process.

Constituent attribute options

	Include	Field	Caption	Require
⋮	<input checked="" type="checkbox"/>	Dietary Preference	<input type="text" value="Dietary Preference"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Committees	<input type="text" value="Committees"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	# of Family Members	<input type="text" value="# of Family Members"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Closing Codes	<input type="text" value="Closing Codes"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Interests	<input type="text" value="Interests"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Organization Type	<input type="text" value="Organization Type"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Origin	<input type="text" value="Origin"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Retirement Date	<input type="text" value="Retirement Date"/>	<input type="checkbox"/>

## Email Address Type Field

To enable you to specify which email address to use for messages you send to constituents in **Blackbaud Internet Solutions**, a new **Email address type** field is now available when you create templates from **Email, Templates** or messages from **Email, Messages**. When a constituent does not have the email address type you select in the field, the message is sent to their primary email address.



Save Send test Send final Return

Email Editor

Recipient lists: [ ] [?]

Test lists: [ ] [?]

Test emails: [ ] [?]

Name of email: [ ] \*

Subject: [ ] \*

From address: [ ] \*

Issue date: [ ]

Send after date: [ ] [?]

From name: [ ] \*

Appeal: (no Appeal selected) Select... \*

Email address type: Primary

[More options...](#)

## Sending a Final Email

To increase email efficiency in **Blackbaud Internet Solutions**, we have enhanced the send final email process to help make sure the correct group of recipients receive your intended email. Now, when you click **Send final** on an email message, a new Send Status tab appears for you to view the target lists, the number of recipients in each list, and when the lists were last refreshed.

Email Editor Send Status

Status : Not Sent [?]

You are sending this email to following lists:

List	Email addresses	Last refresh
List 2	88 email addresses	(5/1/2016 12:16:32 PM)
List 3	22 email addresses	(5/1/2016 11:20:31 AM)

Total Recipients: 110 email addresses

Refresh Lists Last refresh of these lists took 1:56:10

Are you sure you are ready to send?

Yes

**Note:** This new feature only applies to email sent from *Messages*.

To make sure the latest recipients are in the queries that the lists use, click **Refresh Lists**.

Email Editor Send Status

Status : Not Sent [?]

You are sending this email to following lists:

List	Email addresses	Last refresh
List 2	88 email addresses	(5/1/2016 12:16:32 PM)
List 3	22 email addresses	(5/1/2016 11:20:31 AM)

Total Recipients: 110 email addresses

Refresh Lists Last refresh of these lists took 1:56:10

Are you sure you are ready to send?

Yes

A message appears for your review before clicking **Start Refresh** to begin the process.

You cannot send the final email until the refresh completes, but you can perform other tasks in the program. Depending on the size and complexity of your lists, the refresh may take an extended period of time.

Start Refresh

Cancel

**Tip:** It is important to read this message. It informs you that you can do other tasks in the program while the refresh processes, but you cannot send the final email. It also states the refresh may take an extended period of time depending on the size and complexity of your lists.

After the refresh completes, click **Yes** to actually send the final email to recipients.

Email Editor Send Status

Status : Refresh Complete

You are sending this email to following lists:

List 2	88 email addresses	(5/1/2016 12:16:32 PM)
List 3	22 email addresses	(5/1/2016 11:20:31 AM)

Total Recipients: 110 email addresses Refresh Lists Last refresh of these lists took 0:06:10

Are you sure you are ready to send?

Yes

When you do this, one more refresh occurs automatically for lists that use dynamic queries. This may cause the recipient numbers on the Sent Status tab to differ from the final sent numbers that appear in email reports. If your lists use static queries, this does not apply. For more information about email statuses, refer to the **Blackbaud Internet Solutions Email Guide**.


**Note:** When you enter a date in the **Send after date** field, the email does not send until the date and time you specify in that field.

## Integration Services Setting: Number of Records to Update

When you view the **Blackbaud CRM Integration service** setting on the Schedules tab in **Blackbaud Internet Solutions Administration**, it now displays the number of records to update in **Blackbaud CRM**. This is an informative way for you to monitor the amount of data the setting needs to process, which helps you avoid integration delays from **Blackbaud Internet Solutions** to **Blackbaud CRM**.

**Blackbaud CRM integration**

Select how often to send information to **Blackbaud CRM**.


Number of records to update [342](#) on 6/1/2016 at 8:32 AM 

Frequency:

☐ Never

☐  records every  (minutes)

☒ 500 records daily at  12 :00  AM

Last run: 6/1/2016 8:28 AM (In web server's time zone)  
 Completed successfully

When you select the hyperlink for the number of records to update, a screen appears that lists each record type to update. The number of records to update for each type also appears, along with the type's last integration date.

Number of records to update <span>×</span>		
Record type	Records to update	Last update date
Users	0	10/3/2014 3:36:05 PM
Email Recipients	0	6/6/2016 8:56:03 PM
Newsletters	0	
Web Traffic	0	6/10/2016 4:52:22 PM

To view the latest data currently waiting for process from **Blackbaud Internet Solutions** to **Blackbaud CRM**, select the **Refresh** icon. When the refresh completes, the date and time update to reflect when you last refreshed the number.

Under **Frequency**, you also now specify the number of records to send to **Blackbaud CRM** during each schedule in the updated interval and daily options.

**Tip:** This feature surfaces the number of records on the Schedules tab that previously only appeared in the back end web.config file.

## AddressFinder and DeceasedRecordFinder Enhancements

We have made some improvements to the performance and security of the *AddressFinder* and *DeceasedRecordFinder* processes in Data Tune-Up. On the main Data Tune-Up page in *Administration*, we have added a **Finder settings** configuration task.

**Edit finder settings**

**Credentials**

User name:

Secret key:

**Organization data**

Address:

City:

State:  ▼

Post code:

NAICS code:  [What's this?](#)

You should contact Support to receive your new credentials to enter on the Edit finder settings screen. You will also need to enter some information about your organization.

We have also separated each process into four separate steps, rather than three. Previously the first step created and submitted the file to Blackbaud for processing. Now the first step is to create the file and give you a record count of how many records are included. This is so that you can better manage and track your actual number of records submitted for processing against the number of records you have contracted with Blackbaud to process. Step two is when you submit your file to Blackbaud. Step two also alerts you as to how many records you are submitting to be processed; you may be charged if you submit more records than you have contracted with Blackbaud to process.

**Data Tune-Up Quarterly**

Created on: 6/23/2016      Create output selection: Yes  
 Addresses to include: All addresses      Overwrite existing selection: Yes  
 Selected constituents: Individual Constituents      Output selection name: Change of Address - Quarterly  
 Description: Change of Address helps you keep up with the 40 million Americans who change their address each year. It provides you the most current address information available on your constituents. The data is based on the United States Postal Service.

**Configure data tune-up** [?] [?]

Data tune-up settings

**Step 1: Create file** [?] [?] [?] [?] [?]

Status: ⚠ Completed with exceptions

Status message: Completed with exceptions

Started by: BLACKBAUD\TinaFe      Server name: MINH NZ0  
 Started: 6/23/2016 9:14:01 AM      Total records processed: 758169  
 Ended: 6/23/2016 10:17:45 AM      Number of exceptions: 91  
 Duration: 1 hour 3 minutes 44 seconds      Records successfully processed: 758078

**Step 2: Submit file to Blackbaud** [?] [?] [?] [?] [?]

Status: [?]  
 Status message: [?]  
 Started by: [?]  
 Started: [?]  
 Ended: [?]  
 Duration: [?]  
 Server name: [?]  
 Total records processed: [?]  
 Number of exceptions: [?]  
 Records successfully processed: [?]

The final two steps remain the same with the exception of the step number. In step three (formerly step two), you retrieve the processed file from Blackbaud. And in step four, the final step (formerly step three), you can update the records in your database.

After you upgrade, you must enter the information for this new configuration task before you can run any existing or new *AddressFinder* or *DeceasedRecordFinder* processes.

## Email Security Enhancement

Due to updated security enhancements, there is now more stringent security to enforce strong email passwords.

Strong passwords must meet the following criteria:

- Are case-sensitive
- Must be a minimum of 8 of characters long
- Cannot contain any part of your full name
- Cannot contain any part of your account name
- Cannot be one of your last 24 used passwords
- Must contain a combination of uppercase letters, lowercase letters and numbers:
  - Uppercase letters (A - Z)
  - Lowercase letters (a - z)
  - Numbers (0 - 9)
- May contain one of the following special characters: ! \$ . # %

After updating to Service Pack 9, you may be required to change your password before you can send email. To determine whether you need to change your password, go to **CRM > Administration > Configuration > Email Services** and confirm if you can successfully connect. If you receive an error, contact Support to help you update your password.

## Service Pack 10

These features were introduced in Service Pack 10 after the original **CRM 4.0** release.

### Link Additional Revenue Types to Opportunities

There are now additional types of revenue that you can link to opportunities in order to track high-impact donations. Previously, **Blackbaud CRM** allowed you to associate pledges and donations with an opportunity to signify the level of fulfillment of the opportunity. You now can link opportunities to event registrations, matching gift claims, and planned gifts.

To link a matching gift claim or event registration, from the record, click **Link opportunity** under **Tasks**. Planned gift revenue records have an **Opportunity** field you can use to link the records.

To unlink opportunities, click **Unlink opportunity** under **Tasks** on the matching gift claim or event registration. For planned gifts, you can edit the revenue record and remove the opportunity from it.

Once you link these items to the opportunity, a link to the opportunity record appears in the Details section of the Designations tab.

You can also add these items to an opportunity from the Associated Revenue tab. Click **Add to search for existing unassociated revenue**. The Opportunity Unassociated Revenue Search screen appears. From this screen, you can filter the results to specific revenue types.

In the Opportunity details section of the Details tab, the **Revenue committed** and **Total paid amount** fields now reflect the additional revenue in their totals.

The **Total Revenue Committed** and **Total Amount Paid** fields on the My Fundraiser page are also updated with the revenue amount.

#### Solicitor Credit Rules

Solicitor credit allows you to track the overall performance of your solicitors by giving credit to one or multiple solicitors on a revenue record. Once you link an opportunity to revenue, solicitor credits associated with the opportunity will default to the revenue.

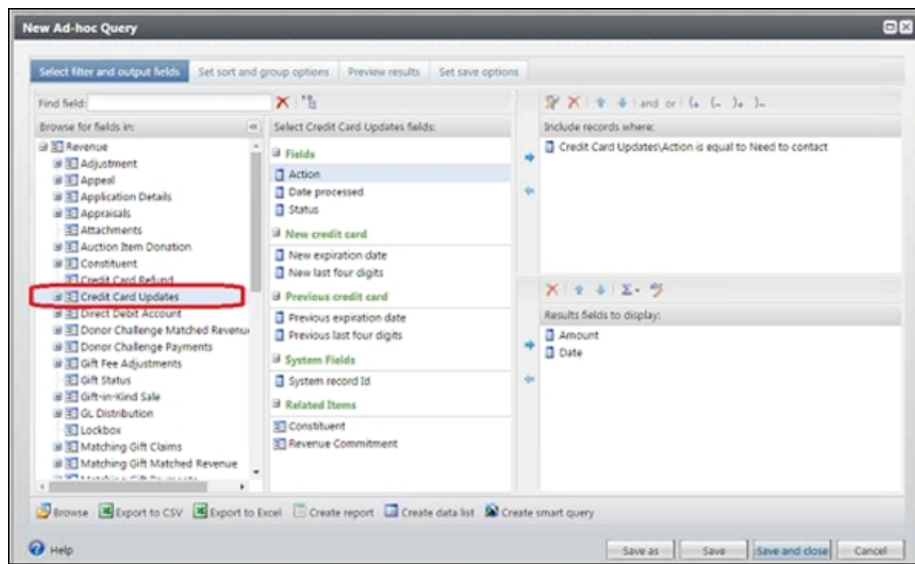
**Note:** If you choose to unlink the opportunity from the revenue, you must manually remove the solicitor credit rules.

### Query Enhancements for the Credit Card Updater Service

We have added some additional query functionality to enhance your ability to use the Credit Card Updater Service. Originally, we provided a Credit Card Updates query that you could use to help track changes made by the Credit Card Updater Service.

Now, we have added a "Credit Card Updates" query node in Constituent query and in Revenue query. We now also include the **Action** field in the query nodes so you can more readily find constituents with a "Need to contact" status. With these enhancements, you can more easily query on and mail to constituents who were included in the Credit Card Updater process, but whose card updates were not

successful. Contact with these constituents may help you secure new cardholder information from your loyal supporters.



## Giving List Enhancement to Include Recognition Credits

We have enhanced the Giving List by now including the ability to use this report based on recognition credit information instead of just revenue information. In the Giving List report, you can now use the Summary section to indicate whether the report should include just revenue information (as it did before) or whether it should include recognition-based information instead. The other filters, such as date ranges and more, can still be used and will be applied to recognition information.

**Note:** The Giving List requires the use of the Blackbaud Data Warehouse.

## Attributes for Appeals, Sponsorships, and Financial Transaction Line Items

To help improve the usability and flexibility of the program, we have added the ability to create attributes for several additional record types: appeals, sponsorships, and financial transaction line items. In Administration, you can create the attribute categories for these record types. After you create the attribute categories, an attributes tab will appear for these different records.

## Credit Card Tokenizer

Your organizations may engage the services of third-party vendors to help manage constituent-related information, such as to update existing donor or constituent information or to recruit new donors. Third-party vendors who collect sensitive credit card information can use the **Blackbaud CRM** Credit Card Tokenizer to easily send this information securely to the **Blackbaud Payment Service** for tokenization.

The vendor can then destroy any sensitive credit card information and return only the secure token information back to your organization to import into **Blackbaud CRM**.

The Credit Card Tokenizer offers two methods to securely tokenize sensitive credit card information.

- Vendors can write custom code to securely deliver credit card information directly to the Web Service endpoints mentioned below. The credit card information is tokenized and stored in the **Blackbaud Payment Service** and vendors will receive the secure token information for cards directly back from the endpoints. For more information, see the Credit Card Tokenizer endpoint documentation at <https://www.blackbaud.com/files/support/guides/enterprise/CreditCardVaultEndpoint/inwebapi-developer-help.htm>.
- Alternatively, your organization can provide a specific URL found in *Administration*, with vendor- and user-specific login credentials, to each vendor. These credentials use the same user access and authentication controls as **Blackbaud CRM**. The URL is to a secure .ashx page on the same web server as **Blackbaud CRM**. The vendor can then log in to the Credit Card Tokenizer page and select a file of constituent and credit card information to upload. The file is then submitted to the **Blackbaud Payment Service** and vendors will receive the secure token information in a return file to download.

For both methods, the CreditCardVault AppFx Web Service endpoint accepts credit card information, wraps it up in a call to the **Blackbaud Payment Service**, and then returns tokens in place of sensitive credit card information.

**Note:** No credit card processing happens during this process, nor is any sensitive information written to the disk. Sensitive credit card information is simply submitted by a third-party vendor the organization has contracted with to the **Blackbaud Payment Service** for tokenization. The return file to the vendor contains cardholder names, last four digits of the card numbers, along with the credit card tokens. If additional information is included in the original file, such as other constituent information not related to cardholder information, that information is included in the return file. No sensitive card number data is returned, even if the card could not be tokenized. In that case, relevant exception messaging from the **Blackbaud Payment Service** is provided along with the cardholder names. Any sensitive information is completely removed from **CRM** servers after the file is returned.

## Additional Recurring Gift Information in the Data Warehouse

To help improve reporting from the **Blackbaud Data Warehouse**, we have added additional recurring gift information. The additional information includes first installment, last installment, recurring gift amendments, recurring gift installments, and recurring gift past due amount.

## Additional Education Information in the Data Warehouse

To help improve reporting from the **Blackbaud Data Warehouse**, we have added additional education information. The additional information includes academic catalog, education, and involvements.

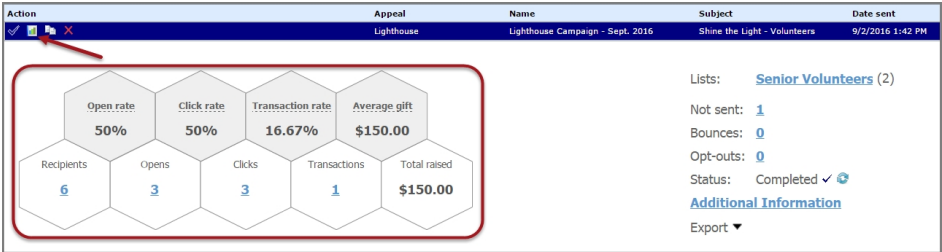


# Email Performance Statistics Enhancements

To modernize email and improve statistical information to current industry standards, performance statistics for email messages have been enhanced in Blackbaud Internet Solutions. To centralize the data, you now view most statistics for an email message in one grid instead of clicking multiple tabs and sub-tabs. After you send a message, its row on the Messages page updates to display the grid. The percentages and counts that display update automatically each time you access the grid so you always view the latest statistics.

**Note:** The email performance statistic enhancements are only available in *Email > Messages*, not in *Email > Campaigns* or *Email > Newsletters*.

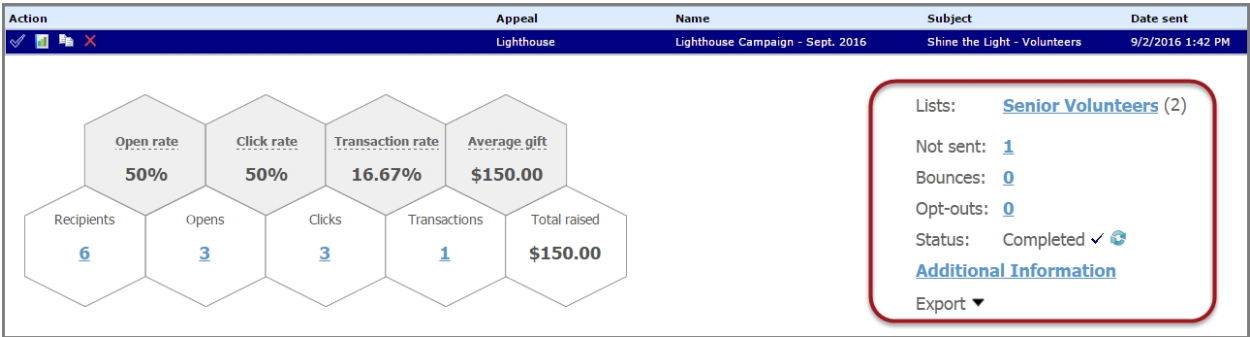
From *Email, Messages*, select a message and click **Click here to view report** (📊) in the **Action** column. The performance statistics grid displays below the message row.



The top row of the grid displays the email activity percentages for **Open rate**, **Click rate**, and **Transaction rate**, as well as the **Average gift** amount raised as a result of the message. You can hover over each statistic title to view a description of how the value was calculated.

The bottom row of the grid lists email activity in total amounts for **Recipients**, **Opens**, **Clicks**, and **Transactions**. You can click each amount to view a list of email addresses associated with the statistic. The **Total raised** amount is also shown.

Next to the statistics grid, additional information displays.



Here you can view the distribution lists used for the message, the number of messages that were not sent or that resulted in bounces and opt-outs, and the email job status. When you click the **Not Sent**, **Bounces** and **Opt-outs** values, you can view more information about these statistics, such as the associated email addresses.

Click **Additional Information** to display more details about URL performance, total number of views and unique viewers, total number of transactions, and the message content and properties. You can also export the email statistics to a \*.csv file. Click **Export**, then select either Summary or Details.

The **Email Status Log** icon displays in the **Action** column and to the right of the statistics grid next to **Status**. Depending on the status of the email job, the icon displays as one of the following:

✓ - Completed

i - In progress

⚠ - Failed

You can click the icon to display more information about the email status.

## Confirm Email Address Field

To improve email address accuracy, multiple parts now include the option to include a new **Confirm email address** field. When you select to display it on a web page, website users must enter their email address two times. Blackbaud Internet Solutions then compares the two email addresses to make sure they match.

**Additional fields**

Select the additional fields to display on the donation form.

Field	Include	Required
Middle name	<input type="checkbox"/>	<input type="checkbox"/>
Confirm email address	<input type="checkbox"/>	<input type="checkbox"/>

The following parts now include this field.

- Donation Form
- Event Registration Form
- Membership Form
- Sponsorship Form
- User Login Form

## Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. Blackbaud Internet Solutions was automatically updated in this release to include security improvements for credit card processing in compliance with Payment Application Data Security Standard (PA-DSS). Please refer to this list to determine whether your organization needs to take any action.

- **Enhanced Password Protection:** We now use industry-tested and accepted hashing algorithms to encrypt and store user passwords. This provides stronger protection for user data as passwords are no longer stored in the database. However, no changes are required by your organization if your website uses standard password functionality in Blackbaud Internet Solutions.

**Note:** If your organization uses a customization to integrate your website with a third-party single sign-on system, the customization may not work correctly. We recommend that you consult your single sign-on system provider to determine how the PA-DSS 3.2 requirements may affect your integration with Blackbaud Internet Solutions.

- **Site-Wide Secure Pages:** Previously, you could require encryption for all pages, secure content, or administration pages in *Sites & settings*. Now, Blackbaud Internet Solutions requires encryption for all pages on your website to provide site-wide security and protect your users' connections to your website. The URLs for all Blackbaud Internet Solutions web pages use "https" to securely render the pages via Transport Layer Security (TLS) protocol. This provides three layers of protection: encryption, data integrity, and authentication.

**Note:** If your web pages incorporate content from non-secure sites, the content may not display or website users may receive a warning that the site has mixed content. This occurs because the Blackbaud Internet Solutions page uses a secured HTTPS connection, but some of the content on the page is referred by a non-secured HTTP URL. Non-secure content can be located in Formatted Text or Unformatted Text parts, the page layout, or the site style sheet. To correct this issue, identify affected parts and change the URL for the external content to a secured HTTPS connection.

- **Improved Security for Testconfig Page:** Testconfig is a page on your Blackbaud Internet Solutions website that reveals helpful information about your site's configuration, product versions, server-to-server connectivity, and more. To improve its security, testconfig.aspx is now accessible only from your local server.

## JQuery Version Upgrade

With this release of Blackbaud Internet Solutions, we have upgraded the JQuery version from 1.7.2 to 1.12.3.

## Support for International State Fields

Blackbaud Internet Solutions now uses existing CRM address formats to determine whether to display or hide the **State** field on all web pages that allow users to enter address information.

Previously when entering addresses for any nationality, the **State** field always displayed, except for the UK, Australia, and New Zealand. Now, if a **State** value does not apply to the selected country, the **State** field is hidden on the web pages. If the **State** value is in CRM international address formats for the selected country, then the **State** field is visible on the web page and is required by Blackbaud Internet Solutions.

**Note:** The **State** field still displays for the United States, United Kingdom, Australia, New Zealand and Canada even if the **State** or **State Abbreviation** value is not included in the address format in CRM.

This enhancement was made to the following Blackbaud Internet Solutions parts:

- Donation Form

- User Login Form
- Payment 2.0 Form
- Event Registration Form
- Profile Update Form

## Upcoming Change for Email Forwarding

At Blackbaud, we are committed to providing you with tools that leverage the latest market trends and technology. We have reviewed email forwarding needs and concluded that alumni and other users will be better served by other email forwarding vendors that provide more advanced capabilities. For example, email forwarding solutions like Google offer full email hosting services as opposed to only email forwarding. In light of our research, we recommend that your organization transition from the built-in email forwarding functionality in Blackbaud Internet Solutionsto Google's free email forwarding service in early 2017.

For more information about Google's email forwarding service, visit the [Google Domains Help Center](#). You can also review [how to set up email forwarding in Google](#). Blackbaud Customer Support representatives will be available to assist your organization with the migration process.

## Service Pack 11

These features were introduced in Service Pack 11 after the original **CRM 4.0** release.

## Blackbaud Data Warehouse ETL Snapshots

This feature helps address performance and other related issues with the **Blackbaud Data Warehouse** and the ETL refresh process. To help address these issues, we have added a new setting to "Advanced Options" of the data warehouse deployment wizard to "Use Database Snapshots," which is enabled by default when you upgrade.

With this setting enabled, each time you run an ETL refresh process, the process will create a database snapshot of the CRM database. The process will run against the snapshot during the refresh rather than the OLTP database itself. The snapshot is automatically deleted after use.

Note that the user accounts for users running the ETL refresh process will be automatically granted "CREATE ANY DATABASE" permissions on the server and "db-owner" permissions on the CRM database, which are required to take use this new feature successfully. Custom ETL packages which write back to CRM rather just reading from the database will need to be updated to use the new "writeback" connection or will otherwise fail. This connection string takes its value from the new configuration file "BBDW\_ETL\_WRITEBACK\_CONFIG.dtsConfig," which is automatically created and updated during deployment with the original configuration file "BBDW\_ETL\_CONFIG.dtsConfig." Additionally, a new environment variable to point to the new configuration file, "BBETL\_WRITEBACK\_[database name]\_RPT\_BBDW," is automatically created and updated with the original environment variable, "BBETL\_[database name]\_RPT\_BBDW."

To take advantage of this fix, you must redeploy the **Blackbaud Data Warehouse** and complete an incremental refresh. For more information, see <http://kb.blackbaud.com/articles/Article/107190>.

## Locations for Constituent Interactions and Major Giving Plan Steps

We have added a **Location** field for constituent interactions and for major giving plan steps. You can select an existing, active address from the constituent record to use as the location, such as "Home" or "Work." You can also select "Other" and then enter a different location or address in the **Other location** field.

## AddressFinder Processing Acknowledgement Form

With this release, the **AddressFinder** service in the Data Tune-Up section of *Administration* now requires an electronic Processing Acknowledgement Form (PAF) each time your organization submits a file to Blackbaud. The new electronic PAF is a simple acknowledgement checkbox on the "Submit file" screen which you must mark each time you submit a file to the **AddressFinder** service. This indicates your organization is granting consent for Blackbaud and our vendor to process the file. For more information on the United States Postal Service PAF policies, see <http://kb.blackbaud.com/articles/Article/105383>.

## Event Registration Form

This service pack includes a new Event Registration Form part with functionality improvements and usability enhancements to both the Edit Part screen and the web pages that the part generates on your website.

New functionality improvements for the part include [increased support for appeal and campaign data](#) and integration with event preferences. Usability enhancements include better organization of the part's design options to avoid scrolling, and help text improvements to clarify what appears on the page. For website users, usability enhancements include a simplified registration process that has been reduced to three steps and numerous quick links so users can autofill registrant data.

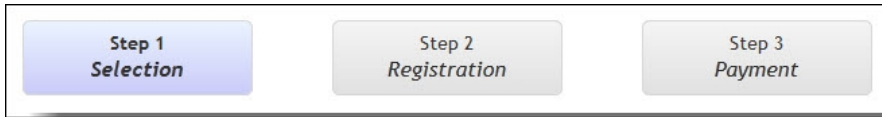
**Show Me:** Watch a video about the new [Event Registration Form](#) part.

### Event Registration Form (Classic)

The original Event Registration Form part is now called Event Registration Form (Classic). It does not upgrade to the new event part and remains available to use on your website with its original design. There are a few features the Event Registration Form (Classic) includes that the new Event Registration Form part does not, such as Payment 2.0 part integration and the ability to link to another page from the event. You may want to consider this when you create the new part.

## Event Registration Form: Website

When you include the new Event Registration Form part on a page in *Site explorer*, the registration options appear on three separate pages on your website. Each page includes a status bar so website users can view their progress as they complete the event registration process. Users can click the button in the status bar to go to the previous or next page.



**Note:** The Step 3 *Payment* button appears when a user selects a paid event type on the Step 1 *Selection* page and then clicks **Continue**.


**Step 1 Selection** — The first page of the event registration process displays event details from Blackbaud CRM such as the descriptions, start dates, and times for events. Website users select events to attend and the number of registrants, and if you include a field for donations, they can also make additional gifts. The summary of the user's selections displays at the bottom of the page and dynamically updates as the user enters information.


Step 1 Selection

Step 2 Registration

Step 3 Payment

☒ Afternoon Tea


 Saturday June 20


 2:00 PM - 5:00 PM

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

Category	Quantity	Price	
Child 1 registrant	<input type="text" value="0"/>	\$50.00	
Adult 1 registrant	<input type="text" value="2"/>	\$75.00	

☒ Winter Ball

 Monday December 20

 5:00 PM - 9:00 PM

Winter Ball to be held at the People's Palace

Category	Quantity	Price	
Corporate Sponsor 1 registrant	<input type="text" value="0"/>	\$225.00	
Individual 1 registrant	<input type="text" value="2"/>	\$100.00	

Event registration summary

Afternoon Tea:	Adult	2	\$75.00
Winter Ball:	Individual	2	\$100.00
Total:			\$350.00

☐ Register as an organization

Continue

**Step 2 Registration** — On the second page, website users enter details for all registrants. To copy contact information, users can select **Use this address for all registrants** and click **Apply to all registrants** for certain fields. After users enter registrant information for an event, links for the registrants appear on the next event, and users can click the links to autofill registrant information.

In the following screenshot, you can view the checkboxes and links that allow users to autofill additional registrant information.

Step 1 Selection

Step 2 Registration

Step 3 Payment

### Afternoon Tea

**Saturday June 20 2:00 PM - 5:00 PM**

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

Afternoon Tea

**Registrant 1 - Adult**

First name:  Last name:  [Apply to all registrants](#) \*

Email:  [Apply to all registrants](#) Phone:  [Apply to all registrants](#)

**Address**

Country:  \*

Address lines:  \*

City:  \*

State:  \*

ZIP:  \*

☒ Use this address for all registrants

☒ Use this as my billing information

Afternoon Tea

**Registrant 2 - Adult**

☐ Register later (The guest can provide this information when checking in to the event.)

First name:  Last name:  [Same as above](#) \*

Email:  [Same as above](#) Phone:  [Same as above](#)

☐ Use this as my billing information



## Winter Ball

**Monday December 20 5:00 PM - 9:00 PM**

Winter Ball to be held at the People's Palace

Winter Ball

### Registrant 1 - Individual

Same as a previous registrant?

[Elizabeth Smith](#) [Julian Smith](#)

First name:	Last name:
<input type="text" value="Elizabeth"/>	<input type="text" value="Smith"/> *
Email:	Phone:
<input type="text" value="esmith@abc123.org"/>	<input type="text"/>

[Apply to all registrants](#) [Apply to all registrants](#)

### Address

Country:

\*

Address lines:

\*

City:

\*

State:

\*

ZIP:

\*

☒ Use this address for all registrants

☐ Use this as my billing information

Winter Ball

### Registrant 2 - Individual

Same as a previous registrant?

[Elizabeth Smith](#) [Julian Smith](#)

☐ Register later (The guest can provide this information when checking in to the event.)

First name:	Last name:
<input type="text" value="Julian"/>	<input type="text" value="Smith"/> *
Email:	Phone:
<input type="text" value="jsmith@abc123.org"/>	<input type="text"/>

[Same as above](#) [Same as above](#)

☐ Use this as my billing information

The user also selects applicable options for the event depending on the details you select to include on the part. For example, if you select to include an event preference for dietary requirements, the user may select vegetarian.

Cobblestone Afternoon Tea

**Registrant options**

**Registrant 1 -**

Special Dietary Requirements

<Please select> ▼

<Please select>

Gluten free

Vegetarian

Dairy free

Vegan

Special Request

**Step 3 Payment** — On the third page of the event registration process, the program renders the secure payment page on the Blackbaud server to process transactions for event registration payments. When website users select multiple events with multiple charges, the total cost automatically defaults on the secure payment page. For information about the secure payment page, refer to the *Parts Guide*.

**Note:** When you include free events on the part and a website user only registers for free events, this page does not appear.

Step 1 Selection    Step 2 Registration    **Step 3 Payment**

Amount: **150.00** total

Email:

Phone:

Country:

Address:

City:

State & ZIP:

Name on card:

Card number:

Expiration: month  year  CSC:

☐ I'm not a robot

reCAPTCHA

Cancel    **Complete payment**

When users submit event registrations, event transactions download into the BBIS Event Registration Transaction Batch type in Blackbaud CRM. After you process transactions, event registration data appears on the applicable records in Blackbaud CRM. For information about event registration transactions and where data maps to in Blackbaud CRM, refer to the *Web Transactions Guide*.

# Event Registration Form: Edit Part

When you design the new Event Registration Form part, you now configure each event's options in its own configuration screen. You can enter text and HTML in the **Description** field and select **Use event capacity** to limit the maximum number of registrations based on the event record's capacity in Blackbaud CRM. The **Event price options** grid includes new column headers and help text to clarify what appears on the web page. You can also sort the event types in the order you want them to appear on the page.

**Event configuration: Afternoon Tea**

**Event display options**

Name: \*  


Enter the event information to appear on the web page.

Description: \*  

We will meet at the Playground Site for a brief meeting and introduction. We will then take the shuttle to Cobblestone House for tea and desserts.

☐ Use event capacity

Select this option to use the event capacity from *Blackbaud CRM* as the registration limit. The event's capacity is 100.

**Event price options**

Select the event types to include on the web page and enter information for each type. The types appear on the page in the same order that they appear in the grid. To reorder them, drag the dotted button.

Type	Include	Name	No. registrants	nts ?
☰ Child	<input checked="" type="checkbox"/>	Child		
☰ Adult	<input checked="" type="checkbox"/>	Adult		

In the **No. registrants** column, enter the number of registrants per type. For example, for a Couple type, enter "2". This number appears in the **Category** column on the event web page.

Under **Registrant options**, you can expand each event type and select whether to let users register additional guests as anonymous. You can also select and reorder biographical fields and additional options that will appear on the registration page. In response to your feedback in the [idea portal](#), the part now also integrates with preferences from the event record in Blackbaud CRM. Event preferences are listed with participant attributes under **Additional options**. In both grids, you can change the text that displays in the **Caption** field. In the **Include** and **Required** columns, select which fields to display and require for primary registrants and their guests.

**Registrant options**

To select registrant options for each event type you include on the web page, click the arrow beside it. Types in this grid appear as the original default regardless of your selections in the **Event price options** grid. For example, when you remove a type or reorder the list in the **Event price options** grid, it does not impact the types in this grid.

Type

Child
Adult

☒ Allow anonymous

To allow the person who pays to register additional registrants as anonymous, select this checkbox.

Field options

Include	Field	Caption	Required
<div> <div>Participant</div> <div>Guest</div> </div>	First Name	First Name	<div> <div>Participant</div> <div>Guest</div> </div>
<div> <div>Participant</div> <div>Guest</div> </div>	Last Name	Last Name	<div> <div>Participant</div> <div>Guest</div> </div>
<div> <div>Participant</div> <div>Guest</div> </div>	Email	Email	<div> <div>Participant</div> <div>Guest</div> </div>
<div> <div>Participant</div> <div>Guest</div> </div>	Address	Address	<div> <div>Participant</div> <div>Guest</div> </div>

Additional options

Include	Field	Caption	Required
<div> <div>Participant</div> <div>Guest</div> </div>	Special Dietary Requirements	Special Dietary Requirements	<div> <div>Participant</div> <div>Guest</div> </div>
<div> <div>Participant</div> <div>Guest</div> </div>	Special Mobility Requirements	Special Mobility Requirements	<div> <div>Participant</div> <div>Guest</div> </div>
<div> <div>Participant</div> <div>Guest</div> </div>	Special Request	Special Request	<div> <div>Participant</div> <div>Guest</div> </div>

When you click **Options**, important options appear for the part such as how many people can be registered in one web transaction and which constituent code to apply to registrants. You can also select an appeal to associate with registration payments and specify whether to include a field for additional donations on your registration page. In this section, you also select how you want free events to appear on the page.

**Options****Total registrants**

Maximum registrants available per checkout:

50

**Select constituency**

Apply a constituency to registrants:

Alumnus

**Appeal Tracking**

Select an appeal to associate with event registration payments:

Appeal

HOLIDAY (20)
Remove

**Additional donations**

☐ Allow additional donations

When you create a new Event Registration Form or edit it, the Edit Part screen is condensed by the event configuration screen and the **Options** link. This greatly enhances your ability to view the part so you can quickly identify the area to make your changes.

Event Registration Form : Events Fall 2016 (Edit Part)

Design | Helplets | Language | Properties | Usage | Targeting & security | Tags

### Add events

Event name	Event date	Actions
Afternoon Tea	10/17/2016	<a href="#">Edit</a> <a href="#">Remove</a>
Alta Tennis Tournament	10/20/2016	<a href="#">Edit</a> <a href="#">Remove</a>

[Add an event](#)

### Options

#### Payment options

Merchant account: \*  
IATS-US Select the merchant account to use to process event transactions.

Select at least one payment method for event registrants to use.

☒ Credit Card

☒ Pledge (Bill me later)

## Appeal and Campaign Tracking for Events


On Event Registration Form parts in Blackbaud Internet Solutions, you can now select appeals from Blackbaud CRM to associate with event registration payments. From the Design tab, under **Options**, a new section for **Appeal tracking** displays.

▼ **Options**

**Total registrants**  
Maximum registrants available per checkout:  
50

**Select constituency**  
Apply a constituency to registrants:  
▼

**Appeal tracking**  
Select an appeal to associate with event registration payments:

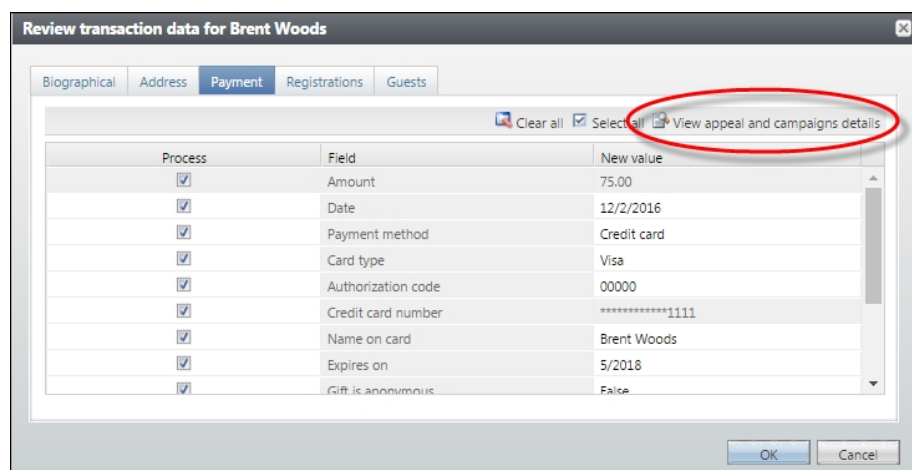
Appeal
(no appeal selected)  Remove

**Additional donations**  
☐ Allow additional donations

**Note:** If an Event Registration Form part includes only free events, the **Appeal tracking** section is grayed out.

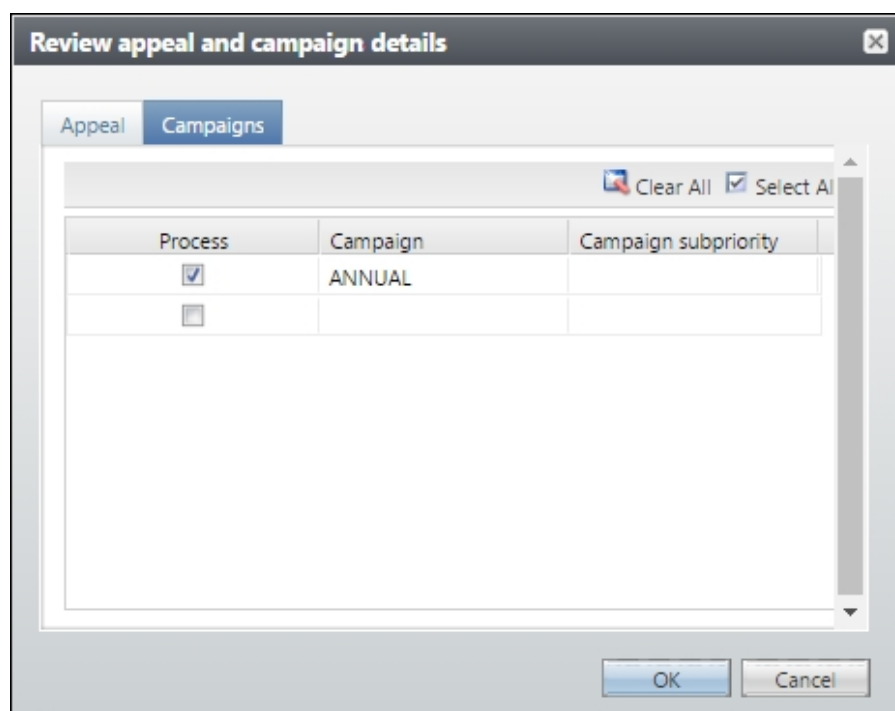
To select an appeal, click the binoculars. Any appeals that are already associated with the event record in Blackbaud CRM display on the search screen. You can also click **Search** to view and select from all active appeals.

Event registration payments are automatically associated with campaigns that have been added to the event record in Blackbaud CRM. Within a BBIS Event Registration Transaction Batch in Blackbaud CRM, you can now modify the appeals and campaigns that are associated with event registration payments. When you review transaction details in an uncommitted batch, you can now click **View appeal and campaigns details** on the Payment tab.



Process	Field	New value
<input checked="" type="checkbox"/>	Amount	75.00
<input checked="" type="checkbox"/>	Date	12/2/2016
<input checked="" type="checkbox"/>	Payment method	Credit card
<input checked="" type="checkbox"/>	Card type	Visa
<input checked="" type="checkbox"/>	Authorization code	00000
<input checked="" type="checkbox"/>	Credit card number	*****1111
<input checked="" type="checkbox"/>	Name on card	Brent Woods
<input checked="" type="checkbox"/>	Expires on	5/2018
<input checked="" type="checkbox"/>	Gift is anonymous	False

In the window that opens, you can select the Appeal or Campaigns tab to review and modify the appeal and campaign selections for event registration payments prior to committing the batch.



Process	Campaign	Campaign subpriority
<input checked="" type="checkbox"/>	ANNUAL	
<input type="checkbox"/>		

## Communication Preferences Form Enhancements

We've made some enhancements to the Communication Preferences form in Blackbaud Internet Solutions to provide functionality improvements to email communication preferences.

## New Email Address Selector Property

Previously, users had the option on the Communication Preferences form to specify which email address they wanted to use to receive email communications. Because some customers prefer not to give users this choice, we've added the ability for administrators to disable the email selection option globally for all email types.

Use the new **Email address selector** property on the Form tab to configure whether or not to allow email address selection on the Communication Preferences form.

The screenshot shows the Blackbaud CRM 4.0 Form Designer interface. On the left, the 'Add fields' pane shows 'Form elements' and 'Communication preferences'. The main area displays 'Step 1' with a form titled 'Please let us know the email newsletters you would like to receive from us Double click to edit.' It includes two newsletter sections with radio button options: 'Yes, sign me up!', 'No, I'm not interested', and 'No preference'. At the bottom, there is a checkbox for 'I no longer wish to receive any emails from Blackbaud University'. On the right, the 'Properties' pane is open, showing a table of form properties. The 'Email address selector' property is highlighted with a red circle and is set to 'No'.

Name	Value
After update navigate to	
Anonymous user message	Please log in to update your communication...
Button text - Next	Next
Button text - Previous	Previous
Button text - Submit	Submit
CSS class	
Email address selector	No
Form field help position	Default (Below)
Form field help style	Default (Inline)
Form type	Communication Preferences Form
Form width	650
Show step name	No
Show steps	No
Stylesheet for preview	

**Form type**  
Shows the type of form created. After you create a form, you cannot change its type.

- Select **No** (default) if you do not want users to select an email address preference. The email selector does not display on the Communication Preferences form and the users' primary email address is used for all email communications.

Because Blackbaud Internet Solutions does not honor the email address preference, it is recommended that if you use only Blackbaud Internet Solutions for email communications, select **No**.

- Select **Yes** to allow users to select an email address preference. The email selector displays on the Communication Preferences form.

Because Blackbaud Direct Marketing (BBDM) can honor the email address preference, it is recommended that if you use only BBDM for email communications, select **Yes** to allow email address selection.

**Note:** If you use both Blackbaud Internet Solutions and BBDM for email communications, it is recommended that you select **No** for this option.

## New Email Opt-in/Opt-out Preferences

In an effort to offer more explicit options for online users, the email preference settings in Blackbaud Internet Solutions have been enhanced to specifically indicate whether users are opting in or opting out of email communications, or if they have no preference either way.



**Step 1** → Events

**Communication**  
Globally opt-out ☐

**Communication**  
Planned Gift Acknowledgement

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

Tribute Acknowledgement

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

Revenue Acknowledgement

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

**Directory messages**  
I do not want to receive messages from directory website users ☐

**Communication**  
ANN-DEV

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

ANN-GUEST

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

ANN-EM

**Opt-out**

☐ Send me these emails  
☐ Do not send me these emails  
☐ No preference

**Send to**  
Mail ▼

**Properties**  
Form Step Element

Name	Value
(Name)	Acknowledgements
Advanced properties	Click here to edit
Communication text	Communication
CSS class	
Header text	
Mail options text	Send to
No preference text	No preference
Opt-in column text	
Opt-in text	Send me these emails
Opt-out text	Do not send me these emails
Targeting	1 selected

The **Acknowledgements** element is a grouped element that enables online constituents to specify their preferences for acknowledgements.

There are now three email preference options, Opt-in, Opt-out, and No preference, available for each communication type. This gives users the option to explicitly opt out of receiving a certain email type. Users who do not have a previously set choice in Blackbaud CRM will have their email preference options set to **No preference** by default. They can subsequently modify these preference settings on the Communication Preferences form and submit the changes.

You can use the Element tab to customize the text that displays to the users for each of the preference options. You cannot leave the text field blank for these options.

- **Opt-in:** Default text is *Send me these emails*.
- **Opt-out:** Default text is *Do not send me these emails*.
- **No preference:** Default text is *No preference set*.

## Global Opt-Out Confirmation Text

The global opt-out option allows users to opt out of all communication from your organization. We've added the ability to include text for a confirmation message that displays in red beneath the global opt-out option when users select it.

**Step 1**

Please let us know the email newsletters you would like to receive from us. Double click to edit.

Newsletter 1

☐ Yes, sign me up!  
☐ No, I'm not interested  
☐ No preference

Newsletter 2

☐ Yes, sign me up!  
☐ No, I'm not interested  
☐ No preference

☐ I no longer wish to receive any emails from Blackbaud University

**Properties**

Name	Value
(Name)	Global Opt-out
Caption	I no longer wish to receive any emails from...
Communication text	
CSS class	
Global opt-out confirmation text	You will not receive email from us.
Header text	
Opt-in column text	

The **Global Opt-out** element is an element that enables online constituents to opt-out of all communications.

On the Element tab, use the **Global opt-out confirmation text** property to specify the text you want to display when users select the global opt-out option. The default text for the confirmation message is *You will not receive email from us*. You can edit the text to customize your message or you can leave this field blank if you do not want to display a confirmation message.

## Directory Private Email Messaging

An enhancement was made to the Directory part in Blackbaud Internet Solutions that now enables alumni and other users to send messages to others in the directory without sharing their email addresses. This functionality is available only for website users who are logged in to Blackbaud Internet Solutions; anonymous users do not have the capability to use directory messaging.

**Note:** A website user can send a maximum of 10 messages per hour. When this limit is reached, a message displays telling them to try again later.

On the Design tab of a Directory part, select **Allow messaging between users** to enable messaging.

**Constituent Attributes**

- Primary Education Attributes
- Education History Attributes

**Listing Fields:**

Up Down

**Messaging Fields**

☐ Allow messaging between users

Save Cancel

When you select this option, additional fields display below the option so you can configure the message's default text, including the subject, email message, from address, from name, confirmation message, and opt out message.

The screenshot shows a web form for configuring default messages. It includes fields for 'Default subject', 'Confirmation message', 'From address', and 'From name'. Below these is a rich text editor for the 'Configure default message' with tabs for 'Formatting', 'Insert', 'View', and 'Image'. The editor contains a sample message template with placeholders like '<First Name Last Name>' and '<Sender Email Address>'. At the bottom, there is another rich text editor for the 'Configure opt out message' and a footer note about unsubscribing from directory messages.

Default subject:

Confirmation message:

From address:

From name:

Configure default message:

Formatting Insert View Image

Cut Copy Paste

Font family Font size

B I U ABC A [List Icons]

Find and replace Paragraph Remove formatting

Hi ,

I'm glad I found you through the Alumni directory. If you would like to connect with me please email me at .

I hope to hear from you soon!

Path: p

Configure opt out message:

Formatting Insert View Image

Cut Copy Paste



Font family Font size

B I U ABC A [List Icons]

Find and replace Paragraph Remove formatting

This message was delivered from your University Alumni Directory. To unsubscribe from directory messages, please [click here](#).

**Note:** To avoid having the email rejected or considered spam, the **From address** must be an email address on a domain that the organization owns and controls. This is necessary as some email providers such as Yahoo and AOL have strict DMARC policies that reject any emails with a yahoo.com or aol.com email address that have not originated from those domains.

When messaging is enabled, an email icon () displays in the directory's Messaging column for people who have a primary email address and have not opted out of messaging. To send a message, click  beside the recipient's name to display the message template. You can edit the message as desired, then click **Send message** to send the email. The email is sent via the organization to the recipient, and the recipient's email address is not visible to the sender. A confirmation message displays when the email is successfully sent.

The Communication Preferences form was also updated to support opting out of receiving email messages sent from other directory users.

The screenshot displays the CRM 4.0 Service Pack interface. On the left, the 'Opt-out' section is highlighted, showing a list of communication types with their respective opt-out options. The 'Directory messages' element is highlighted in yellow. The 'Properties' pane on the right shows the configuration for the 'Directory messages' element, including its name, checkbox header, CSS class, header, opt-out text, section header, and targeting.

Name	Value
(Name)	Directory messages
Checkbox header	Opt-out
CSS class	
Header	Directory messages
Opt-out text	I do not want to receive messag...
Section header	
Targeting	1 selected

The **Directory messages** element is an element that enables online constituents to opt-out from directory messaging part only.

In **Directory messages**, select **Opt-out** to have a directory messaging opt-out checkbox display to users on their Communication Preferences form. You can also enter text in the **Opt-out text** field on the Element tab to customize the text that displays for the option.

When users click the unsubscribe link in an email they receive via directory messaging, they are sent to their Communication Preferences form where they can select the directory opt-out option. Users can also clear this option if they had previously opted out and now want to resume directory messaging.

## Updated reCAPTCHA

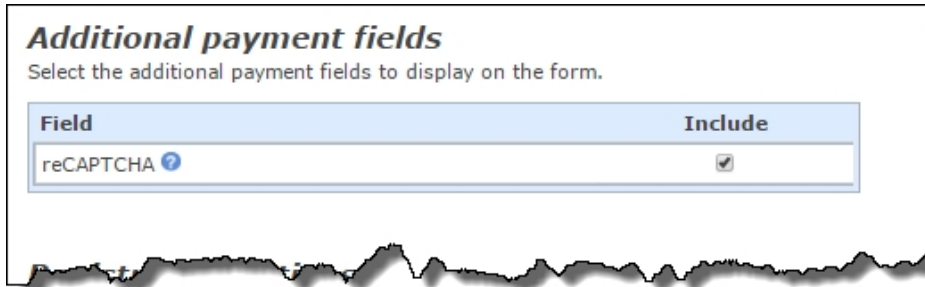
When you enable *reCAPTCHA* in *Administration*, Blackbaud Internet Solutions displays a completely automated public Turing test to tell computers and humans apart (CAPTCHA). With CAPTCHA functionality, the program can ensure a user is not an automated program to generate spam or phish for payment information.

Previously, the program displayed distorted text that users were required to type into a box. To simplify the experience, the program now displays a checkbox labeled "I'm not a robot." Users can select the checkbox to proceed.

The screenshot shows the reCAPTCHA interface. It features a checkbox labeled "I'm not a robot" and the reCAPTCHA logo. Below the logo, there are links for "Privacy" and "Terms".

**Note:** In cases where the program cannot confidently predict whether a user is a human or an abusive agent, it will display an additional test to confirm the user is valid. For example, the CAPTCHA may display multiple images and ask the user to identify which images match a particular description.

The *reCAPTCHA* options you select in *Administration* control all parts in Blackbaud Internet Solutions except Advanced Donation Form, Event Registration Form, and Payment 2.0 parts that use the Blackbaud Secure Payments form. Those parts now include an **Additional payment fields** section on the Design tab where you can select to include *reCAPTCHA*.



When you include this option, a *reCAPTCHA* checkbox displays below credit card payment fields on your Blackbaud Secure Payments form. Users must select the *reCAPTCHA* checkbox before they can submit the form.

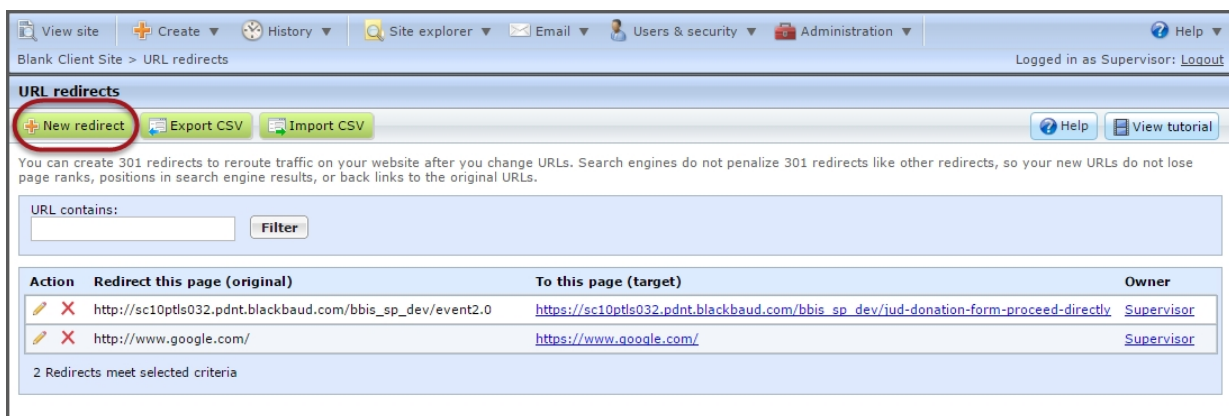
## URL Redirects

We've improved our URL redirect implementation in Blackbaud Internet Solutions to ensure that browser search engines correctly handle your redirected pages.

Previously, when administrators added a new redirect to forward an http URL to an https URL, a 302 redirect was created. Since 302 redirects are considered temporary, this was causing issues with the page indexing by Google's search engine.

Now, our modification to the redirect functionality creates 301 redirects, which are considered as permanent page moves. Since search engines do not penalize 301 redirects like they do with other types of redirects, your new URLs do not lose page ranks, positions in search engine results, or back links to the original URLs.

To create a URL redirect, go to *Administration* > *URL redirects*, then click **New redirect**.



## Service Pack 12

These features were introduced in Service Pack 12 after the original **CRM 4.0** release. For information about Blackbaud Internet Solutions new features, see [Blackbaud Internet Solutions New Features](#).

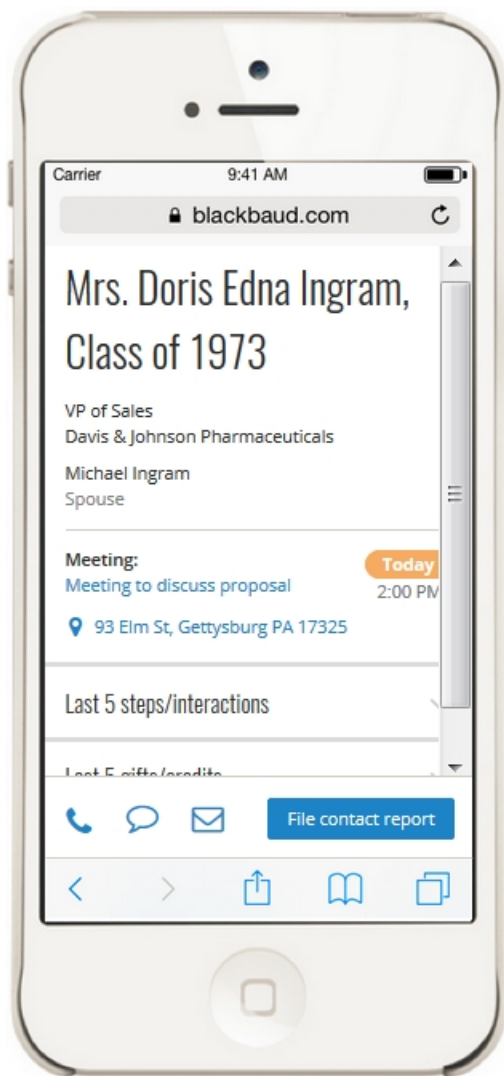
### Recognized Donors List for Recognition Programs

To improve the usability of recognition programs in *Constituents*, we have added a Recognized Donors tab to each recognition program page. On this new tab, you can view a list of donors that have been awarded membership to the program.

### Fundraiser on the Go

*Fundraiser on the Go* is a mobile-first, responsive, web-based application for **Blackbaud CRM**. Users who are designated as fundraisers within **CRM**—and have the "Fundraiser" constituency—can use *Fundraiser on the Go*. The feature permissions for users are located under "Prospect Management>Mobile."

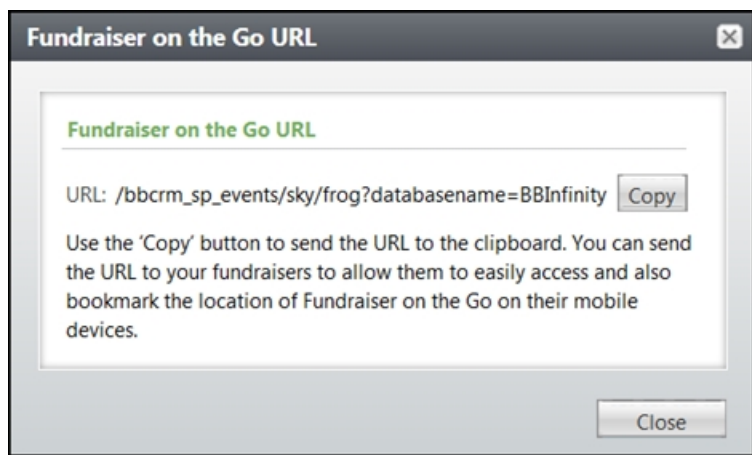
Fundraisers can access their prospect lists and more using a browser on their mobile devices. When you log into *Fundraiser on the Go*, you will see a quick list of your prospects. By clicking on a prospect's name, you can easily drill down into the details, such as contact information, spouse, and notes. For each prospect, you can also see recent and upcoming interactions and steps. You can even file contact reports and add or edit steps when you're on the go. You can also access basic information about the prospect's most recent gifts and recognition credits.



### View Frequently Asked Questions about Fundraiser on the Go

For fundraisers to access *Fundraiser on the Go*, from *Prospects*, click **Fundraiser on the Go**. From this screen, you can copy the URL to send to users. Fundraisers can use the bookmarks or favorites functionality for the browser on their mobile devices for quick and easy access.





[Show me Fundraiser on the Go!](#)

## Enqueued Business Processes

With this Service Pack, we have made enhancements to how some business processes are run in **Blackbaud CRM**. Previously, most business processes, such as acknowledgements and pledge reminders, could only be processed one at a time. This meant that if a pledge reminder business process for one site was running, the process had to finish before a user could start another pledge reminder process. With the new enqueued functionality, multiple instances of a business process type can be started and will be completed automatically, one after the next. The types of business processes that will be enqueued include the Assign Letters process, the Reminders process, and the Revenue Acknowledgement process.

**Note:** This new enqueued functionality will not enqueue existing queues of business processes you set up through the Queue area of *Administration*. Rather it is designed to make it easier to enqueue individual Assign Letters processes, Reminders processes, and Revenue Acknowledgement processes.

On the Business Processes page in *Administration*, there is now an Enqueue tab which displays all of the jobs that are enqueued. Before business processes can be enqueued, you must enter the credentials of a system administrator user that will be used to run the processes. The **Edit enqueue settings** task is on the Business Processes page in *Administration*.

## Credit Card Encryption (Point-to-Point Encryption or P2PE) Improvements in Enhanced Revenue Batch

In order to improve PCI compliance with credit card tokenization in Enhanced Revenue Batch, we have added an interface between **Blackbaud CRM** and the Bluefin® Payment Systems and their credit card encryption device for point-to-point encryption (P2PE). This device enables credit cards to be keyed in or swiped, subsequently encrypted and tokenized through **Blackbaud Merchant Services** and the **Blackbaud Payment Service**, removing the need to store the actual credit card number at any point in the process. For more information about Bluefin Payment Systems, see <https://www.bluefin.com/about/>.



For more information from Bluefin about the integration with **Blackbaud CRM**, see the [Bluefin and Blackbaud Integration Guide](#).

The integration into Enhanced Revenue Batch includes a new **Capture card info** button on the batch toolbar to enable the integration with the Bluefin device to swipe or enter credit card details. The credit card information is tokenized with the **Blackbaud Payment Service**.

## AngularJS Extensibility

BBUI-Angular is a library of tools designed for integration with the Blackbaud Infinity platform using an AngularJS-based web application. It is built in conjunction with SKY UX (<http://skyux.developer.blackbaud.com>) and allows users to build custom Angular web apps that integrate directly with **Blackbaud CRM** data. Find additional information and resources in our GitHub repository (<https://github.com/blackbaud/bbui-angular>).

## Ledger Enhancement for Pledge Payments

To enhance the granularity of your ledger postings, we have added the ability to map payments with an application type of "Committed Pledge" and "Uncommitted Pledge" in the General Ledger Setup area of Administration. A committed pledge payment is one with a status of posted or not yet posted, whereas an uncommitted pledge payment is one with a status of do not post. When you upgrade, the existing "Pledge" mapping option for payments will no longer exist and the two new pledge applications for payments will be available to be mapped. When you upgrade, existing "Pledge" payment mappings will be updated to the "Committed Pledge" mapping. This change will not trigger any ledger or payment adjustments..

## Service Pack 13

These features were introduced in Service Pack 13 after the original **CRM 4.0** release.

## Location Fields and Additional Revenue Details in Fundraiser on the Go

In the Fundraiser on the Go mobile service, we have added a **Location** field for constituent interactions and for major giving plan steps. You can select an existing, active address from the constituent record to use as the location, such as "Home" or "Work." You can also select "Other" and then enter a different location or address in the **Other location** field.

**Note:** The **Location** field is not available on a prospect's contact report; the assumption is that there would be an associated interaction or plan step which resulted in the contact report.

**Edit an interaction** ✕

Intro Meeting

Status \*  
Pending ▼

Comments

Date \*  
07/07/2017

Category  
▼

Subcategory  
▼

Location  
▼

Other location

[Participants](#)

**Save** Cancel

With this release, you also have additional revenue details available, when applicable, in Fundraiser on the Go. These additional revenue details include things like designation, campaign, revenue category, solicitors, recognition credits, and opportunities. For UK clients, the Gift Aid status, tax claim eligibility, and tax claim amount are also displayed, when applicable.

### Recent gifts/credits

<b>\$100</b>	Recurring gift
4/10/2017	Science Center Fund
Designation	
Science Center Fund	
Campaign	
Planned Giving Campaign	
Revenue category	
None	
Solicitors	
None	
Recognition credits	
Jean H. Aertker	
<a href="#">show/hide details</a>	

## Customizable Gender Options for Constituents

We have added the option to select "Other" instead of "Male" or "Female" or "Unknown" in the **Gender** field on an individual constituent record.

Add an individual

IndividualHouseholdBusiness

Personal

Primary contact

Last name:

First name:

Middle name:

Title:

Suffix:

Nickname:

Maiden name:

Marital status:

Birth date:

Gender:

Primary contact

Information source

Title 2:

Suffix 2:

Age:

Unknown

Male

Female

Other

Address type:

Country:

Address:

City:

State:

ZIP:

Do not send mail to this address

Reason:

Phone type:

Phone number:

Email type:

Email address:

Help

SaveCancel

In *Administration*, you can set up a new constituent attribute of the "Code table" value type to contain the additional gender values you want to be available on the constituent record, which may better represent the gender identity of the constituent. Then you can also set up an attribute category extension to show this new field on the constituent record.

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.

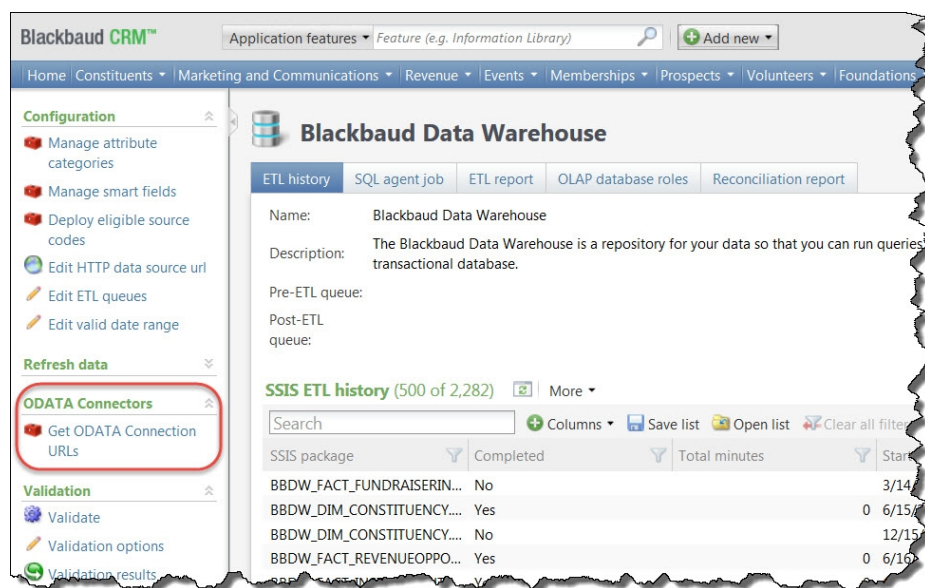
When you create a form extension, you select the form or page to modify; select whether to create a tab or section; enter a label for the tab or section; and select the attribute categories to include.

**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**.

Then, when you select "Other" for gender on the constituent record, you are then able to select the appropriate other value that you set up for the attribute value in *Administration*. For more information on creating new constituent attribute categories, attributes, and attribute extensions, see the Attribute Categories chapter of the [Administration Guide](#).

## OData Integration with the Blackbaud Data Warehouse

With this release, we're introducing OData integration with the **Blackbaud Data Warehouse** for more advanced business reporting and analysis purposes. We still support our previous OData integration with individual queries and smart queries for up-to-the-minute data analysis. However, we recommend our new OData integration with the **Data Warehouse** for more efficient processing. There is a new task in *Administration* for the OData integration which includes a link to use to connect your **Data Warehouse** with a third-party business analysis and reporting tool. From *Administration*, click **Data warehouses** and then select the Blackbaud Data Warehouse. On the Blackbaud Data Warehouse screen, click **Get ODATA Connection URLs** under **ODATA Connectors**.



See the product documentation for your third-party tool for more information in connecting it to the **Blackbaud Data Warehouse**. To take advantage of this fix, you must redeploy the **Blackbaud Data Warehouse** and complete an incremental refresh.

## Service Pack 14

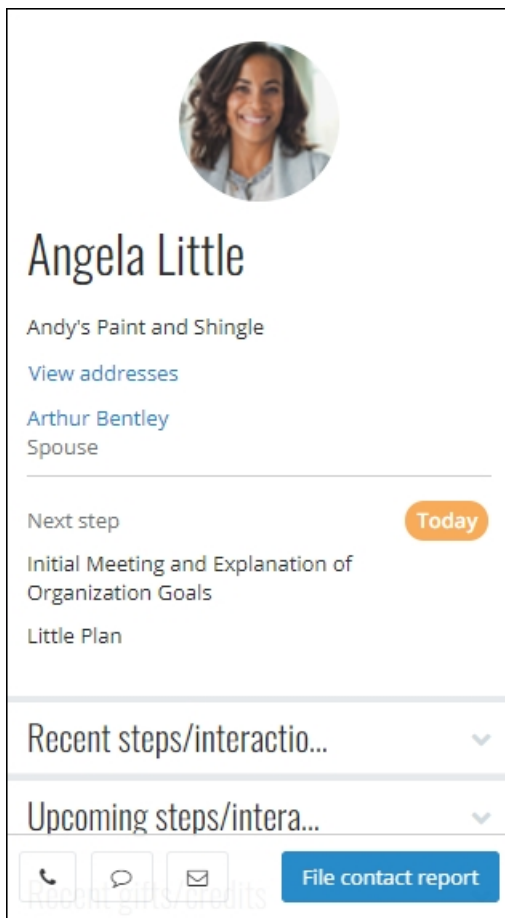
These features were introduced in Service Pack 14 after the original **CRM 4.0** release.

## Fundraiser On The Go

We have made some enhancements to our *Fundraiser on the Go* mobile application.

## Changes to the Prospect Screen

The prospect screen now shows the prospect's picture.



The screenshot displays a CRM contact profile for Angela Little. At the top is a circular profile picture of a woman with dark hair. Below the photo is the name "Angela Little" in a large, bold font. Underneath the name is the company name "Andy's Paint and Shingle". A link labeled "View addresses" is visible. Below that is the name "Arthur Bentley" with the relationship "Spouse" listed underneath. A section titled "Next step" features a date indicator "Today" in an orange pill. The next step is "Initial Meeting and Explanation of Organization Goals" with a sub-note "Little Plan". Below this are two expandable sections: "Recent steps/interactio..." and "Upcoming steps/intera...". At the bottom, there are three icons for phone, chat, and email, followed by a blue button labeled "File contact report".

Angela Little

Andy's Paint and Shingle

[View addresses](#)

Arthur Bentley  
Spouse




Next step Today

Initial Meeting and Explanation of Organization Goals

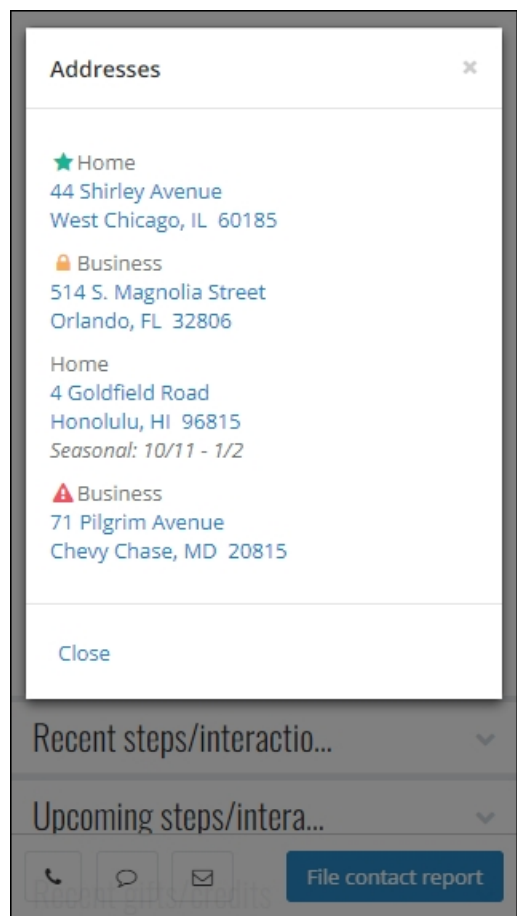
Little Plan

Recent steps/interactio... ▾

Upcoming steps/intera... ▾

   [File contact report](#)

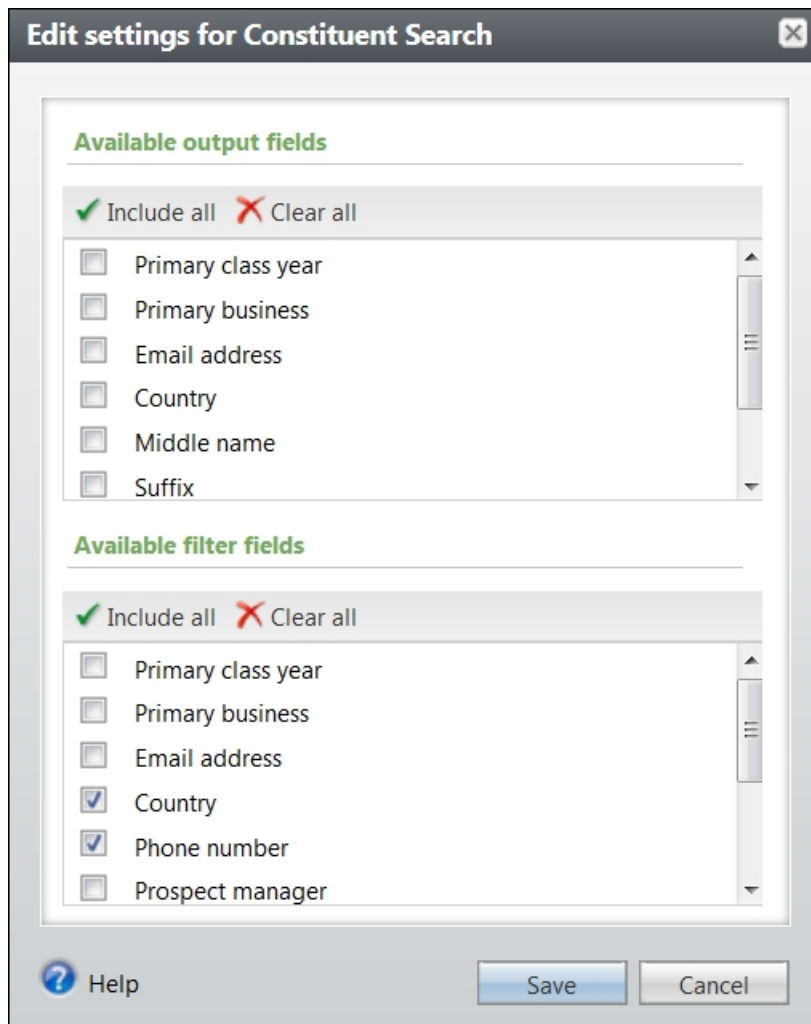
You can also see a prospect's addresses. Tap the new **View addresses** option to display all available addresses.



## Enable Country and Phone Number Search

To search by country or phone number in *Fundraiser on the Go*, you must enable these searches in **Blackbaud CRM**.

1. Toggle to Design Mode.
2. From *Prospects*, right click **Search constituents** and click **Go to search list**. The Search List: Constituent Search page appears.
3. Click **Settings** under **Tasks**. The Edit settings for Constituent Search screen appears.



4. Select "Country" and "Phone number" under **Available filter fields** and click **Save**.

## Show Smart Fields

You can now designate up to five smart fields to see on the application. You can select any smart field that reports a revenue amount.

From an add or edit screen for a smart field, select the "Show this smart field in Fundraiser on the Go" checkbox.



**Add constituent revenue amounts smart field**

General Parameters

**General**

Name:

Description:

Category:

☒ Show this smart field in Fundraiser on the Go

**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

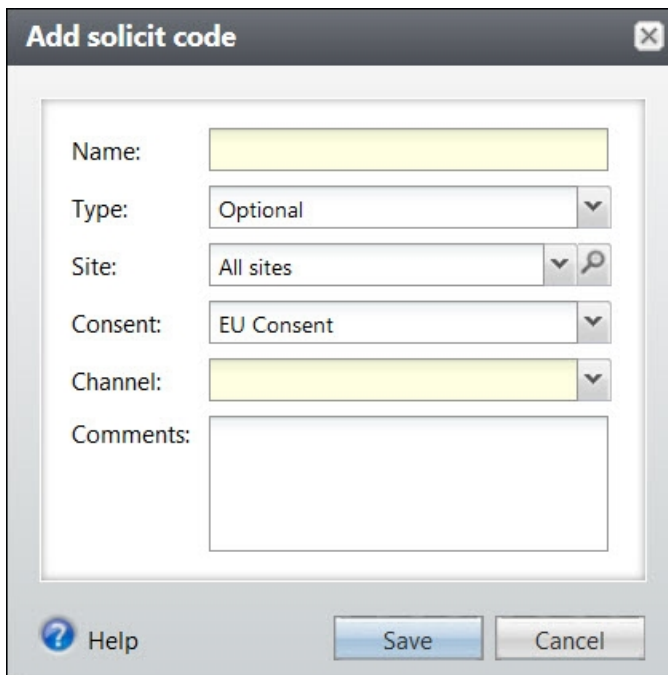
Selected smart fields appear on the prospect screen on Fundraiser on the Go, under the new **Summary information** section. To add or edit smart fields, from *Administration*, select **Smart fields** under **Data**.

## General Data Protection Regulation

The General Data Protection Regulation (GDPR) is a new regulation that governs the way you manage data from constituents in the European Union. To support compliance with these regulations, we have made several enhancements to **Blackbaud CRM**. These enhancements allow you to track consent given by your constituents. In future releases, we will include new functionality to include or exclude these constituents in your mailings.

### Use Solicit Codes to Track Consent

You can now use solicit codes to track GDPR consent. When you add or edit a solicit code, you can use the new Consent field to identify solicit codes you want to use for this purpose. From the drop-down menu, select "EU Consent."



The image shows a dialog box titled "Add solicit code" with a close button (X) in the top right corner. The dialog contains the following fields:

- Name:** A text input field with a yellow background.
- Type:** A dropdown menu with "Optional" selected.
- Site:** A dropdown menu with "All sites" selected, accompanied by a search icon.
- Consent:** A dropdown menu with "EU Consent" selected.
- Channel:** A dropdown menu with a yellow background.
- Comments:** A large text area.

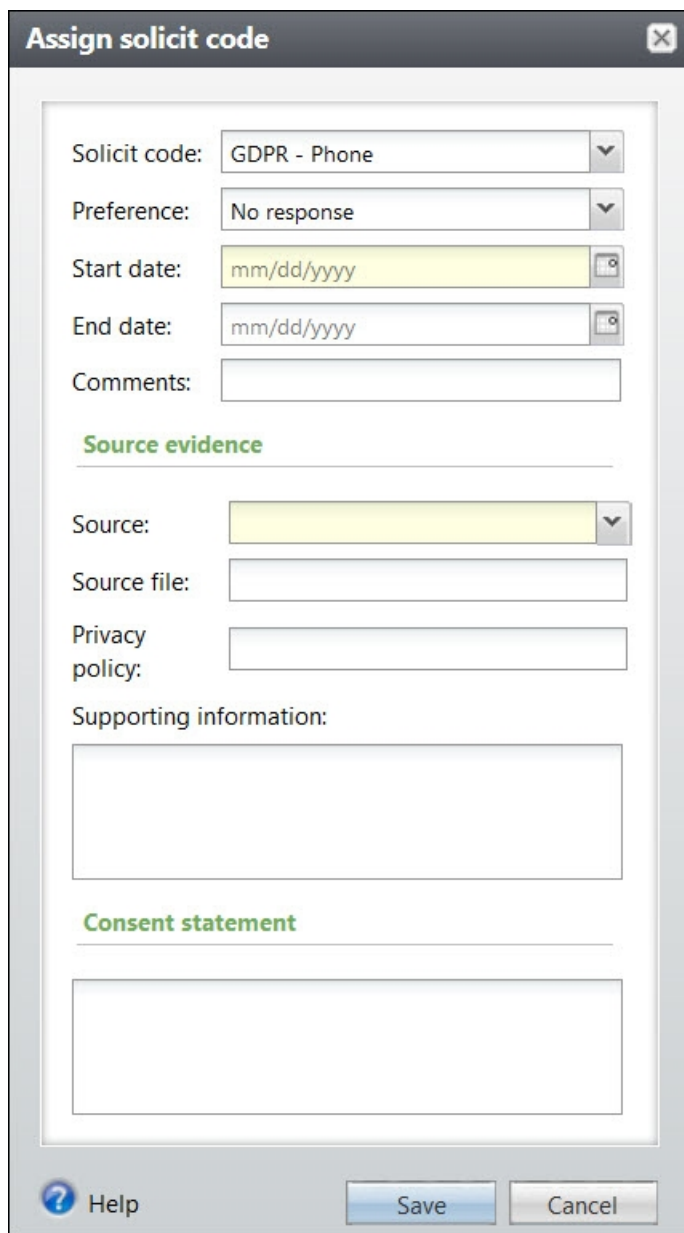
At the bottom of the dialog, there is a "Help" button (with a question mark icon), a "Save" button, and a "Cancel" button.

When you select "EU Consent" in the **Consent** field, the new **Channel** field appears. Create a solicit code for each channel you want to track. If you use sites and want to track consent independently for each site, you must create a separate solicit code for each channel for each site.

To access solicit codes, from *Marketing and Communications*, select **Solicit codes** under **Configuration**.

## Solicit Codes on Constituent Records

On constituent records, solicit codes appear under **Communications, Preferences**. When you add a solicit code that carries consent information, the Assign solicit code screen now includes additional fields.



**Assign solicit code**

Solicit code:

Preference:

Start date:

End date:

Comments:

**Source evidence**

Source:

Source file:

Privacy policy:

Supporting information:

**Consent statement**

[Help](#)

- The new **Preference** field tracks the status of the consent: No response, Opt-out, or Opt-in.
- Under the new **Source evidence** section, you can indicate how you captured consent, link to a file (such as a scanned consent form that the constituent signed), and indicate what version of your privacy policy was used. You can also enter additional details in text form in the **Supporting information** field.
- In the new **Consent statement** section, you can enter the specific consent statement you used for this constituent.

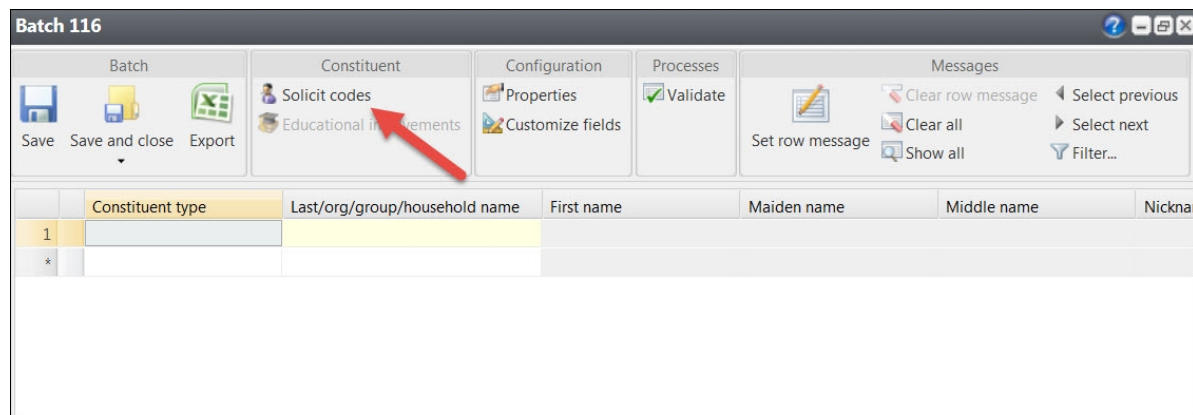
If you enter a new solicit code for a constituent who already has a solicit code of that type with an open date range, the program automatically puts an end date on the existing solicit code and the new solicit

code becomes the active one. This preserves the history of opt-in/opt-out options for the constituent and prevents conflicting consent options on the same record.

## Solicit Codes in Batches and Queries

Solicit codes are available in Constituent batches, Constituent Update batches, queries, and in the Blackbaud Data Warehouse.

Constituent batches already had a **Solicit codes** option during batch entry; we now display this same option for Constituent Update batches as well.



When you include solicit codes in either of these batch types, you can use this option to enter details. The fields have been updated to reflect the new options available for GDPR-related solicit codes.

## Integration

Under **Manage web transactions, Configure integration**, two new communication preference settings were added to support GDPR data integration from the Blackbaud Internet Solutions Communication Preferences form into Blackbaud CRM.

Similar to the **Do not email solicit code** setting, the new **Do not email consent solicit code** configuration setting enables you to identify one of your consent solicit codes to use as your global email opt-out value. A global email opt-out value is required by Blackbaud to comply with international email compliance, including CAN-SPAM, CASL, and GDPR.

The **Consent solicit code source** setting is written to the solicit code record when new values are added from the Blackbaud Internet Solutions Communication Preferences form.

## Event Registration Form - Support for Complex Events

This service pack includes a redesigned Event Registration Form part that supports complex events — such as multi-day events or when there are multiple events on the registration form. The Event

Registration form has a new user interface and a streamlined workflow to make the registration process easier especially when registering multiple attendees for multiple events.

**Note:** One major workflow change is that the attendee registration page displays before the list of events is shown. It is assumed that users will have already seen the list of events before they access the Event Registration Form. When creating an event, our recommendation is that you link users to the registration form at the point that you want users to start their registration.

**Note:** We've used new CSS classes to support the user interface redesign. If your organization currently uses a custom CSS on your event registration forms, you should plan for additional design work in order to incorporate our new form design into your existing site style.

## Event Registration Form: Website

Attendees
Select events
Select options
Review
Checkout

The timer shows how long you have to complete this page before we release your reservation.
9m, 19s

### Upcoming Fundraising Events

Wednesday, September 20, 2017

Attending	Start time	End time	Event name	Ticket price	Subtotal
<b>3 attending</b> <a href="#">Edit</a>   <a href="#">Remove</a>	6:00 PM	11:00 PM	Bingo Night	\$1 - \$20	\$41

Thursday, September 21, 2017

Attending	Start time	End time	Event name	Ticket price	Subtotal
<input type="button" value="Attend"/>	11:00 AM		Harvest Festival	\$2	\$0
<b>2 attending</b> <a href="#">Edit</a>   <a href="#">Remove</a>	8:00 PM	11:00 PM	Black Tie Gala Dinner	\$10	\$20

Tuesday, October 10, 2017

Attending	Start time	End time	Event name	Ticket price	Subtotal
<input type="button" value="Attend"/>	11:30 AM	Thu. 10/12	Camp Carnival	\$10	\$0

**Total due: \$61**

When you include the Event Registration Form part on your website, users can now register multiple attendees for multiple events using the streamlined workflow steps:

**Step 1: Attendees** — Website users can enter details for all registrants, including themselves, multiple guests, and unnamed guests, who will be attending any of the events. When configuring the form, you can specify which fields to display — and which fields are required — on the Attendees page.

**Step 2: Select events** — Shows a list of all events that are available to register for. When selecting an event to attend, website users can select attendees from a drop-down list populated with all attendees that were added in Step 1. As attendees are registered for events, the page is automatically updated with event attendee information and subtotal amounts.

**Step 3: Select options** — Website users can choose options (where applicable) for events, such as preferences and restrictions, for each registrant for each event. Note that event options cannot be selected for unnamed guests.

**Note:** The **Select options** page doesn't display if there are no options available for the selected events.

**Step 4: Review** — Displays details for the selected events, such as who is registered for each event and what their preferences are. Modifications can be made to any event registration by selecting the event's link. When designing the form, you can configure whether this page displays to the website user.

**Step 5: Checkout** — Website users can specify the billing information, additional donations, and the payment method, then make a payment using Blackbaud Checkout.

Once the registration is complete, the transaction data in Blackbaud CRM includes information for each registrant, including event details and options, and payment information.

## Event Registration Form: Edit Part

When you design the new Event Registration Form part, you select multiple events to include on a single form. Select **Add an event** to choose an event from Blackbaud CRM and specify the event's configuration options. All events listed under **Add events** display on the **Select events** page of the Event Registration Form in chronological order. The events are automatically ordered on the form based on their start date and time, so you no longer have the ability to manually reorder events.

Under **Actions**, you can edit or remove events as needed. Optionally, you can also enter text in **Title** if you want to include an event description on the form for the main multi-level event.

Event Registration Form : Fundraising Events 2017 (Edit Part)

Design Helplets Language Properties Usage Targeting & security Tags

**Add events**

Event name	Event date	Actions
Black Tie Gala Dinner	9/21/2017	<a href="#">Edit</a> <a href="#">Remove</a>
Bingo Night	9/20/2017	<a href="#">Edit</a> <a href="#">Remove</a>
Camp Carnival	10/10/2017	<a href="#">Edit</a> <a href="#">Remove</a>
Harvest Festival	9/21/2017	<a href="#">Edit</a> <a href="#">Remove</a>

[Add an event](#)

**Title (Optional)**  
Enter the description for the main multi-level event to display on the web page:

The registrant biographical fields that display on the **Attendees** page are now configured using the new **Field entry options** section under **Attendee options**. In the **Include** and **Required** columns, select which fields to display and which fields are required for hosts (primary registrants) and their guests. You can also modify the text that displays in the **Caption** field and change the order that the fields will display on the form. Under **Organization options**, you can select whether to allow users to register as an organization; if selected, the option displays on the Billing Information page prior to payment.

▼ **Field entry options**

**Attendee options**

Field options

Include	Field	Caption	Required
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Title	Title	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	First Name	First Name	<input checked="" type="checkbox"/> Host <input type="checkbox"/> Guest
<input type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Middle Name	Middle Name	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Last Name	Last Name	<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Suffix	Suffix	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input type="checkbox"/> Host <input type="checkbox"/> Guest	Maiden Name	Maiden Name	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Email	Email	<input checked="" type="checkbox"/> Host <input type="checkbox"/> Guest
<input type="checkbox"/> Host <input type="checkbox"/> Guest	Confirm Email	Confirm Email	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Phone	Phone	<input type="checkbox"/> Host <input type="checkbox"/> Guest
<input checked="" type="checkbox"/> Host <input checked="" type="checkbox"/> Guest	Address	Address	<input type="checkbox"/> Host <input type="checkbox"/> Guest

Under **Options**, a new **Include review step** option enables you to configure whether the review page is displayed to website users during the registration process.

To provide more summary information to users after they've registered for events, we've added a new Event merge field called **Full Event Details** that you can use when customizing the acknowledgment page. When you include this merge field, all the information from the registration form's Review page displays on the acknowledgment page when registration is completed.

Thank you for registering!

The following information was recorded for your registration:

Event	Attendee	Event Options	Event Price
Bingo Night Wednesday, September 20, 2017 6:00 PM - 11:00 PM	arya stark	Yes Food, Medium T-Shirt Size	\$1.00
	sansa stark	Yes Food, Medium T-Shirt Size	\$1.00
	Unnamed	N/A	\$1.00
Black Tie Gala Dinner Thursday, September 21, 2017 8:00 PM - 11:00 PM	arya stark	Vegan Food Preference	\$20.00

Total Amount: \$38.50  
Payment Method: Visa Credit Card (1881)  
Date: 9/14/2017

We would also like to thank you for your additional donation of \$15.50.

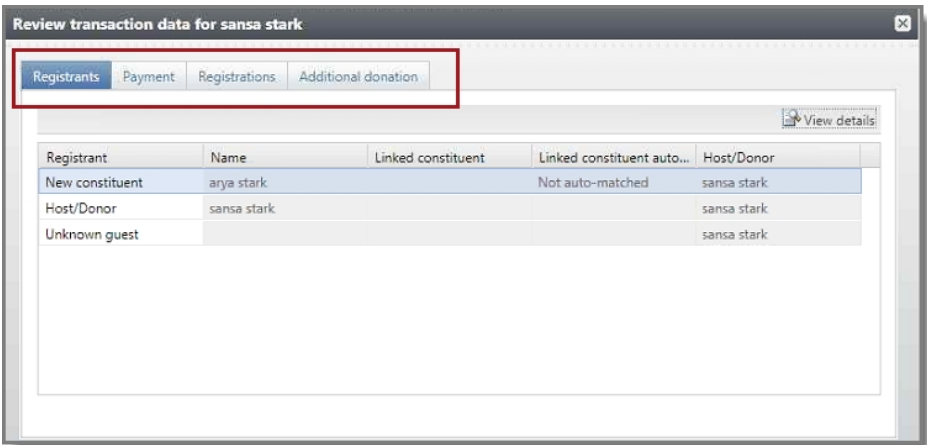
On behalf of our entire organization, thank you again for registering, and we look forward to seeing you at the event!



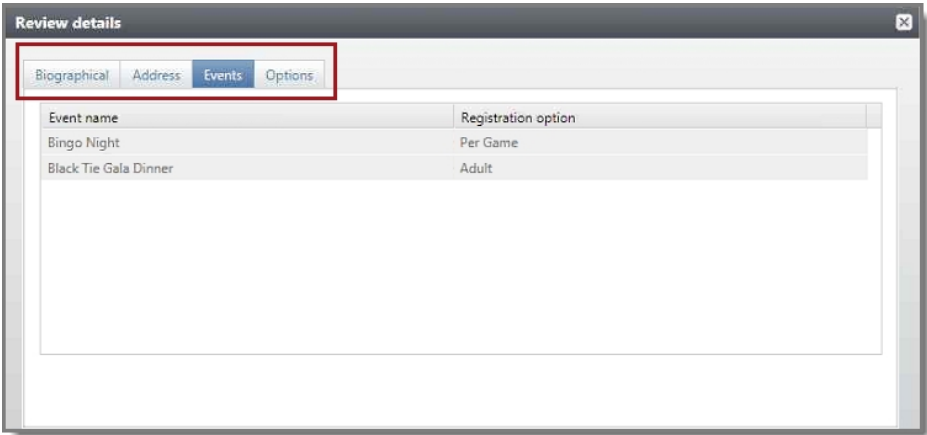
# Event Registration Batch Processing User Interface Enhancements

To support our redesigned Event Registration Form part, we've also redesigned the batch processing to better accommodate multiple event registration results. Now, when you review the downloaded event registration batch details in Blackbaud CRM, the information for registrants and events is organized more efficiently.

We removed the **Guest** tab, and now all registered attendees — host, guests, and unnamed guests — display on the **Registrants** tab. The **Registrations** tab shows details for all events that have been registered for. The **Payment** tab shows all payment information that was entered on the payment page during registration. The donation amount and designation are shown on the **Additional donation** tab if an additional donation was made during the checkout process.



When you select an attendee on the **Registrants** tab and then select **View details**, all corresponding event information is displayed. The **Events** tab lists all the events that the attendee was registered for, the **Options** tab shows the preferences selected for each event for the attendee, and the **Biographical** and **Address** tabs show the registrant's personal information.



# Enhanced Communication Consent Support

In order to support the upcoming enactment of the European Union's General Data Protection Regulation (GDPR), functionality was added in this release to ensure organizations capture explicit consent from their constituents before communicating with those constituents by any channel, such as mail, email, or phone.

To support GDPR, a new consent solicit code type was added in Blackbaud CRM. When a constituent's consent is received, preference information and related details for the consent solicit codes are included on the constituent's record on the Communication > Preferences tab. In Blackbaud Internet Solutions, several changes were made to the Communication Preferences form to support the new consent solicit codes.

Name	Value
(Name)	Consent solicit codes
Advanced properties	<a href="#">Click here to edit</a>
Communication text	
Consent statement text	Please select the chann...
CSS class	
Header text	
Message - Required c...	Please make a selectio...
Opt-in column text	
Opt-in text	Opt-in
Opt-out text	Opt-out
Targeting	1 selected

## Email Opt-out

In this release, we've renamed the previous the **Global opt-out** option to **Email opt-out** to more accurately reflect the functionality and meet global email opt-out regulations for those customers who continue to use solicit codes.

## Consent Solicit Codes

The new **Consent solicit codes** element lists consent solicit code options, enabling constituents to explicitly opt-in or opt-out of a specific communication channel. You can configure which consent solicit codes to include on the form by using the Element tab in the Properties pane. Select **Advanced properties**, then specify the consent solicit codes from Blackbaud CRM you want to include on the form, the text to display for each code, and which codes require a consent selection.

# General Correspondence

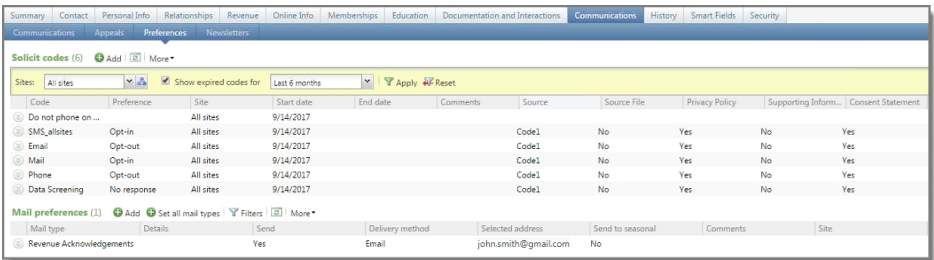
On the **General correspondence** element, the **No preference** option has been removed. Previously, constituents who did not have a previously set choice in Blackbaud CRM had their email preference options set to **No preference** by default. Now, if constituents do not specify a preference to opt-in or opt-out, the message "A preference has not been selected" displays on the form. To change the message, modify the text in the **No preference text** row on the Elements tab.

# Privacy Policy

The new **Privacy policy** element enables constituents to review your organization's privacy policy from the Communication Preferences form. You can select the privacy policy to include by using the Element tab in the Properties pane. Select **Advanced properties**, then either select the Blackbaud Internet Solutions web page or enter the URL where the privacy policy is located. On the Elements tab, you can also modify the text in the **Header text** row to change the header caption, and in the **Privacy policy text** row to change the link display text.

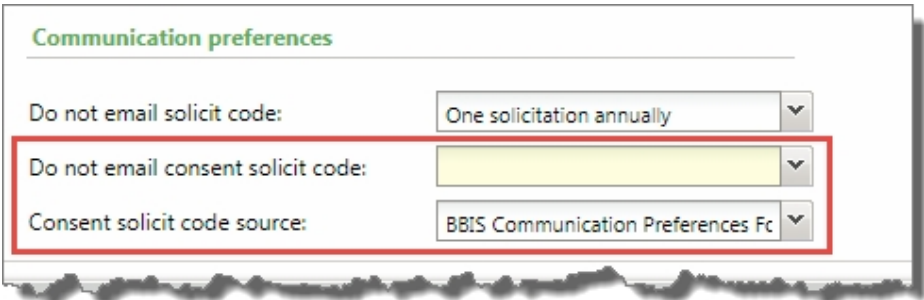
# Blackbaud CRM Integration

When constituents submit their consent preferences via the Communication Preferences form, those preferences are written to their Blackbaud CRM constituent record and display on the **Communications > Preferences** tab under **Solicit codes**. Consent solicit codes, consent statement, privacy policy, and more consent details are included on the record.



Code	Preference	Site	Start date	End date	Comments	Source	Source File	Privacy Policy	Supporting Inform...	Consent Statement
Do not phone on ...		All sites	9/14/2017							
SMS_allistes	Opt-in	All sites	9/14/2017			Code1	No	Yes	No	Yes
Email	Opt-out	All sites	9/14/2017			Code1	No	Yes	No	Yes
Mail	Opt-in	All sites	9/14/2017			Code1	No	Yes	No	Yes
Phone	Opt-out	All sites	9/14/2017			Code1	No	Yes	No	Yes
Data Screening	No response	All sites	9/14/2017			Code1	No	Yes	No	Yes

Two new options — **Do not email consent solicit code** and **Consent solicit code source**— were added in Blackbaud CRM under **Manage web transactions, Configure integration**.



**Communication preferences**

Do not email solicit code: One solicitation annually

Do not email consent solicit code: [Dropdown menu]

Consent solicit code source: BBIS Communication Preferences Fc

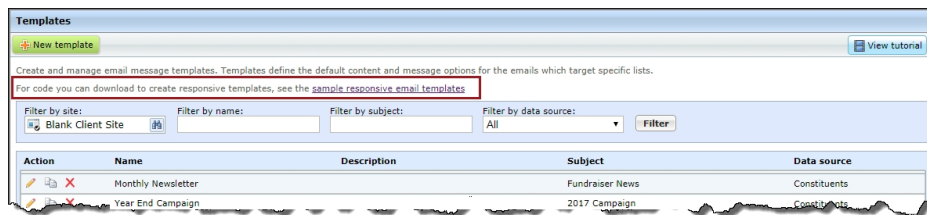
Similar to the **Do not email solicit code** option, the new **Do not email consent solicit code** configuration option allows you to identify one of your consent solicit codes to use as your global

email opt-out value. A global email opt-out value is required by Blackbaud to comply with international email compliance, including CAN-SPAM, CASL, and GDPR.

The **Consent solicit code source** is written to the solicit code record when new values are added from the Blackbaud Internet Solutions Communication Preferences form.

## Sample Responsive Email Templates

In Blackbaud Internet Solutions SP13, we provided three generic responsive email templates that you could download from the Blackbaud Community, and then use in Blackbaud Internet Solutions as default templates. For this release, we've made these email templates available on the BBIS Developer site, and included a link to them from within Email Templates.



There are currently three sample responsive email templates available for download. You can use these sample templates to create your own responsive email messages for acknowledgments, appeals, and newsletters. To use these templates, go to the [BBIS developer site](#) under **Responsive Email Templates** to download the source code and review the instructions for creating a new email template in Blackbaud Internet Solutions.

Also in this release, we've removed the outdated placeholder, mobile-friendly templates from Email Templates.

## Specify Revenue Category on Memberships

You can now specify a revenue category when you add a new membership. This option is available in Membership Dues Batch and when you add a membership to an individual constituent record, but it is not available in the hybrid form view.

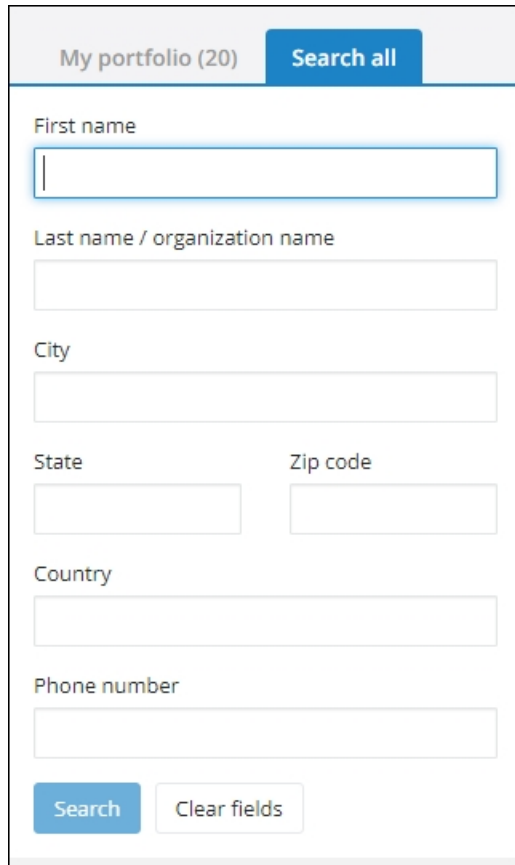
## Service Pack 15

These features were introduced in Service Pack 15 after the original **CRM 4.0** release.

## Fundraiser On The Go

### Search your Database

On the home screen, you can now search your entire Blackbaud CRM database for any constituent. Select the new **Search all** tab to display the Search screen.



My portfolio (20) Search all

First name

Last name / organization name

City

State Zip code

Country

Phone number

Search Clear fields

**Note:** The Phone number field searches primary phone numbers only, and only shows results for exact matches.

You can search by any of the fields on this form. To search by country or phone number, your administrator must enable those search options in **Blackbaud CRM**. If those options are not enabled, the **Country** and **Phone number** fields will not appear on this form.

### Enable Country and Phone Number Search

To search by country or phone number in *Fundraiser on the Go*, you must enable these searches in **Blackbaud CRM**.

1. Toggle to Design Mode.
2. From *Prospects*, right click **Search constituents** and click **Go to search list**. The Search List: Constituent Search page appears.
3. Click **Settings** under **Tasks**. The Edit settings for Constituent Search screen appears.

**Edit settings for Constituent Search**

**Available output fields**

✓ Include all ✗ Clear all

- ☐ Primary class year
- ☐ Primary business
- ☐ Email address
- ☐ Country
- ☐ Middle name
- ☐ Suffix

**Available filter fields**

✓ Include all ✗ Clear all

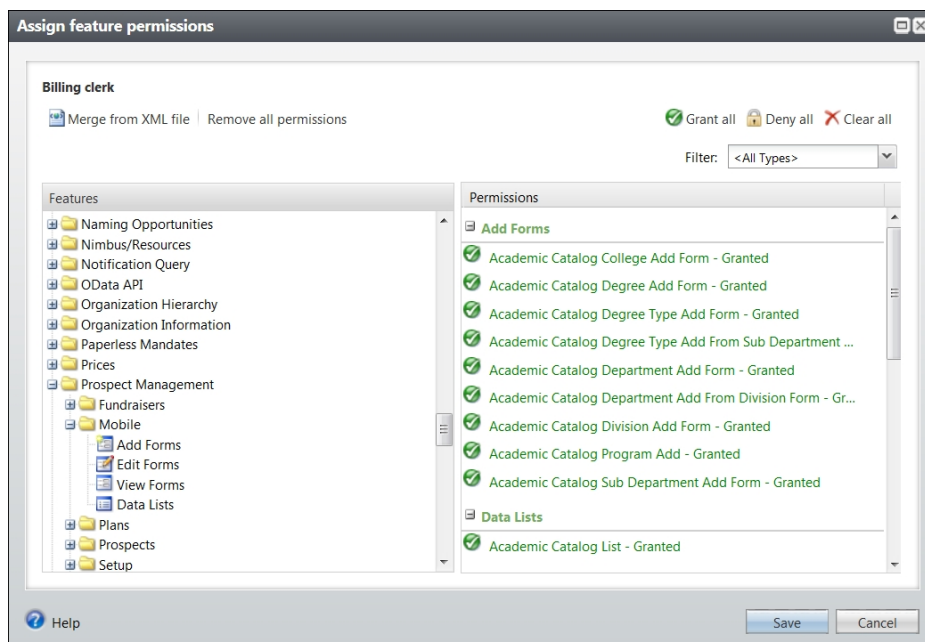
- ☐ Primary class year
- ☐ Primary business
- ☐ Email address
- ☒ Country
- ☒ Phone number
- ☐ Prospect manager

Help Save Cancel

4. Select "Country" and "Phone number" under **Available filter fields** and click **Save**.

## Feature Permissions

If you are using **Fundraiser On The Go** for the first time or you add a new system role for using the app, your administrator must grant specific rights to each user to enable prospect search. Specifically, users must have permission to the Search List Information Mobile View Data Form, the Country Format Data List, and the Country Format Data Form. These permissions are under **Prospect Management, Mobile** in the Assign feature permissions screen.



To access user permissions, from *Administration*, select **Security** and then **Application users**.

## Credit Card Encryption (Point-to-Point Encryption or P2PE) Improvements in Revenue Update Batch and Membership Dues Batch

Continuing with the functionality we introduced in Service Pack 12 for Enhanced Revenue Batch, you can now update existing recurring gifts, pledges, and other payment records in Revenue Update Batch using the Bluefin® Payment Systems integration. In addition, we also now include this integration in Membership Dues Batch.

This functionality allows you to improve PCI compliance with credit card tokenization through an interface between **Blackbaud CRM** and the Bluefin Payment Systems and their credit card encryption device for point-to-point encryption (P2PE). This device enables credit cards to be keyed in or swiped, subsequently encrypted and tokenized through **Blackbaud Merchant Services** and the **Blackbaud Payment Service**, removing the need to store the actual credit card number at any point in the process. For more information about Bluefin Payment Systems, see <https://www.bluefin.com/about/>. For more information from Bluefin about the integration with **Blackbaud CRM**, see the [Bluefin and Blackbaud Integration Guide](#).

To use the integration, use the new **Capture card info** button on the batch toolbar to enable the integration with the Bluefin device to swipe or enter credit card details. The new button appears on the Revenue tab on the Revenue Update Batch and on the Dues tab on the Membership Dues Batch. This button is not displayed when you access the Form view of a Membership Dues Batch from *Revenue*, **Enter membership dues**. To see it, you must access a Membership Dues Batch from *Administration*, **Batch**.

# General Data Protection Regulation

## Solicit Codes

Previously, you could only use one consent solicit code per channel per site. With Service Pack 15, you can now use multiple consent solicit codes for each channel and site, so that you can create a hierarchy of consent solicit codes.

When you add a new instance of a consent solicit code to a constituent record for a code that already exists with a different preference, the previous code is end dated automatically to prevent conflict between the two and maintain an audit history. This will behave the same way when using batch for data entry.

## Mail Preferences

When a constituent has an active, opt-in consent solicit code, you now see a Consent tab on the Add or Edit a mail preference form. To change mail preferences based on consent solicit codes, you must link the solicit code to the mail preference in the new Consent tab.

The screenshot shows a dialog box titled "Add a mail preference" with a close button (X) in the top right corner. The dialog has two tabs: "General" and "Consent", with "Consent" currently selected. The "Consent" tab contains the following sections and fields:

- Consent information**: A dropdown menu for "Linked solicit code:" with "Consent" selected, and a button labeled "Inherit consent" below it.
- Source evidence**: A dropdown menu for "Source:" with a yellow highlight, and text input fields for "Source file:" and "Privacy policy:". Below these is a larger text area for "Supporting information:".
- Consent statement**: A large text area for a statement.

At the bottom of the dialog, there is a "Help" button with a question mark icon, and "Save" and "Cancel" buttons.



If the consent solicit code linked to the mail preference is no longer active, you will see a warning on the mail preference. You can edit the mail preference and link it to a currently active consent solicit code.

## Solicit Code Channel Opt-Out

When you have an active consent solicit code on a constituent record, you now see the new **Solicit code channel opt-out** section under **Communications, Preferences**. This allows you to indicate that a constituent has opted out of all active solicit codes for a given channel. For any active consent solicit codes for that channel, this enters an end date and a comment of "Channel Opt-out" to indicate the reason the opt-in option was changed.

## Constituent Merge

When performing a constituent merge, if two constituent records have the same consent solicit code with conflicting date ranges, the two records will not be merged. If you are merging multiple records, the merge process will succeed but there will be an exception created and the conflicting constituents will not be merged.

## Editing Preferences and End Dates for Consent Solicit Codes

When editing consent solicit codes from a constituent record or through a Constituent Update Batch, you cannot edit the end date or the preference for any consent solicit codes.

## Marketing and Communications

Consent solicit codes will only be excluded from mailings when the constituent has an active code with "No response" or "Opt-out" as a preference. This happens when you select the consent solicit code as an exclusion in a mailing process. This also applies to event invitations sent from the *Events* functional area.

## Global Changes

We have enhanced the **Add constituent solicit code** global change to allow for bulk entry of consent solicit codes. The new fields appear when you select a consent solicit code, and are the same as you would see when you add a consent solicit code to a constituent manually. You can use the global change to add one code at a time.

## Query

The Solicit Codes and Mail Preferences nodes in Query now include all the consent fields. These fields are also available in the **Blackbaud Data Warehouse**.

We have also added a new node called "Solicit Code Channel Opt-out" so you can query on opt-outs entered in the new **Solicit Code Channel Opt-Out** section of the constituent record.

# Communication Consent Part

To enable you to capture communication consent on your Blackbaud Internet Solutions forms — and to be compliant with the General Data Protection Regulation (GDPR) — we've implemented a new Communication Consent part. Your organization can use this new part to collect explicit consent from users — both in the European Union (EU) and elsewhere — for how they want to receive communication from you. In order for any non-profit organization to contact constituents residing in the EU, they must have explicit opt-in consent for any kind of communication via any channel — such as email, phone, SMS, or mail.

As an organization, you can create one Communication Consent part — or multiple versions of the part — to support the forms in Blackbaud Internet Solutions that collect constituent information and write the data to constituent records in Blackbaud CRM.

With this new functionality, you can include a Communication Consent part on any of the following forms in Blackbaud Internet Solutions:

- Donation Form
- Event Registration Form (Classic)
- Events Registration Form
- User Login Form
- Payment 2.0 Form

**Note:** This form supports consent for all transactions types — donations, event registrations, memberships, and sponsorships.

- Advanced Donation Form

When users submit the form, their constituent record is updated on the **Communications > Preferences** tab in Blackbaud CRM with their communication consent preferences.

## Design the part

Use the **Design** tab for the Communication Consent part to configure the part and customize it for your organization.

### General

Title:

Consent

Enter a consent title to appear on the web page.

### Consent Statement \*

Please let us know how we should contact you in the future.

Enter the instructions for the consent.

### Consent Options \*

Add solicit codes and consent solicit codes to display as consent options on the web page.

Name	Display name	Site	Channel	Type	Required	
Consent Mail C...	Consent Mail Channel	All sites	Mail	Consent solicit code	<input type="checkbox"/>	Remove
Alumni Office ...	Alumni Office Newsletter	All sites	Email	Consent solicit code	<input type="checkbox"/>	Remove
Consent Phone...	Consent Phone Channel	All sites	Phone	Consent solicit code	<input type="checkbox"/>	Remove

Add Option
Add Separator

### Privacy Policy \*

Add a link to a privacy policy to display on the web page.

☐ None
☒ Create link to Blackbaud Internet Solutions page:

Privacy Page

☐ URL:

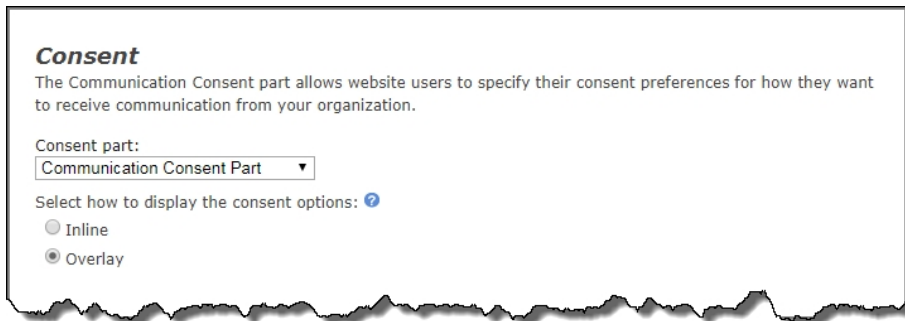
Under **General**, you can customize the title to display on the web page for the communication consent preferences or you can use the default message. You can also include customized instructions under **Consent Statement** or use the default statement.

Under **Consent Options**, add the consent options you want to display on the web page. Select **Add Option** to search for solicit codes or consent solicit codes that are configured in Blackbaud CRM, then choose the ones to include on the form. For each consent option, you can modify the caption that displays on the form, specify whether the option is required, or remove the option. Optionally, you can add a divider to separate sections on the form — for example, to keep all email consent options together — by selecting **Add Separator** and include a caption for the separator. You can click and drag the consent options to reorder them and to move the corresponding separators.

Under **Privacy Policy**, select an option for including access to your organization's privacy policy on the web page. Select **Create link to Blackbaud Internet Solutions page** to choose an existing page on your website. Select **URL** to specify the web page where the privacy policy is located. If you don't want to include a link, select **None**.

## Add the part to a form

You can add a Communication Consent part to a form by configuring the **Consent** section on the form's Design tab.



**Consent**

The Communication Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Consent part:

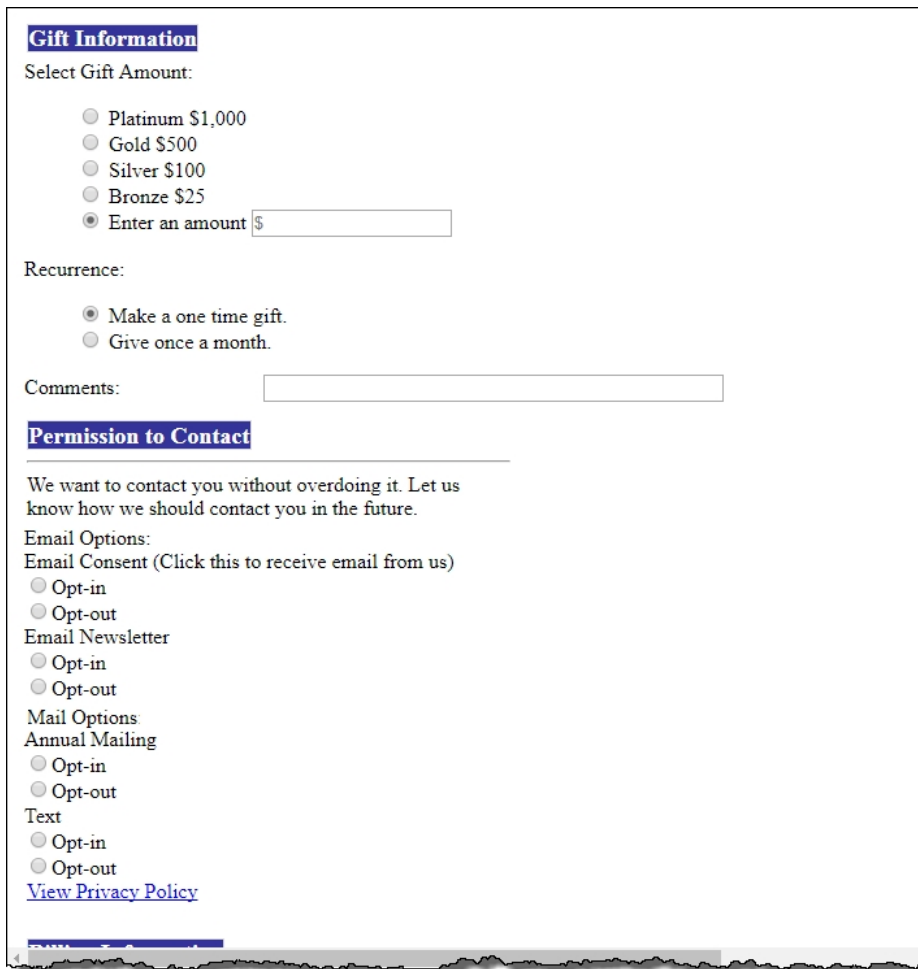
Select how to display the consent options: ?

☐ Inline  
☒ Overlay

Under **Consent part**, select a saved Communication Consent part to include on the form, then specify how you want the consent options to display.

Depending on your organization's site design or how your forms are styled, you can select whether to use the inline option or the overlay option to gather consent.

The **Inline** option includes the communication consent options embedded directly in the form itself.



**Gift Information**

Select Gift Amount:

☐ Platinum \$1,000  
☐ Gold \$500  
☐ Silver \$100  
☐ Bronze \$25  
☒ Enter an amount \$

Recurrence:

☒ Make a one time gift.  
☐ Give once a month.

Comments:

**Permission to Contact**

We want to contact you without overdoing it. Let us know how we should contact you in the future.

Email Options:

Email Consent (Click this to receive email from us)

☐ Opt-in  
☐ Opt-out

Email Newsletter

☐ Opt-in  
☐ Opt-out

Mail Options:

Annual Mailing

☐ Opt-in  
☐ Opt-out

Text

☐ Opt-in  
☐ Opt-out

[View Privacy Policy](#)

The **Overlay** option displays a pop-up window with the consent options when the form is submitted.

The screenshot shows a checkout page with tabs for 'Attendees', 'Select events', 'Review', and 'Checkout'. The 'Billing Information' section includes checkboxes for 'Bill me later', 'Register as an organization', and 'Use an attendee's contact info for billing'. Below this is a form for 'First Name' (John) and 'Email' (john@new.com). A 'Consent' modal is open, asking for communication preferences. The modal contains a table for 'Communication Type' with columns 'Opt-in' and 'Opt-out'. The table has rows for 'Data Channel', 'Phone Channel', and 'Email \*'. Below the table are 'Solicit Codes' for 'Autumn only', 'Do not phone', and 'Do not mail'. At the bottom of the modal is a 'Continue' button. The background shows 'Event Fees: \$50' and 'Total due: \$50'.

After users submit the form, their consent information is downloaded along with their transaction. After the appropriate batch is committed, their constituent record is updated on the **Communications > Preferences** tab in Blackbaud CRM with their communication consent preferences.

**Note:** You can expect a lag time of approximately 5 minutes between the time you commit a donation or membership transaction batch and the time the consent preferences are written to the constituent's record in Blackbaud CRM.

The screenshot shows the 'Communications > Preferences' tab in Blackbaud CRM. It displays a table of 'Solicited codes' with columns: Code, Preference, Site, Start date, End date, Comments, Source, Source File, Privacy Policy, and Supporting Information. The table has three rows: 'Consent Data Screening Channel' (Opt-in, All sites, 1/11/2018), 'Consent Phone Channel' (Opt-in, All sites, 1/11/2018), and 'Consent Email Channel' (Opt-in, All sites, 1/11/2018). Below the table are sections for 'Mail preferences' and 'Solicited code channel opt-out'.

If a user has already provided consent, when they fill out a subsequent form that includes the Communication Consent part, their consent preferences are automatically populated. Users can modify their consent preferences, and the changes are then written to their constituent record when they submit the form.

If a transaction is canceled for any reason, the constituent's consent preference selections for that transaction are not written to their constituent record.

# Communication Preferences Form Enhancements

To support more configuration flexibility, we've made several enhancements to the Communication Preferences form to improve how you can configure the form to capture user consent.

Previously, you could only include one element per type on the form. After an element was added, it was grayed out in the **Add fields** list so that it couldn't be added again. With this enhancement, you can now add multiple instances of the same element type to the form — for example, you can add more than one **Consent solicit codes** element. However, *each element of the same type on the form must have different properties*. Under **Advanced properties**, when you add a property for an element, that property cannot be added again to the same element type on the same form.

In addition, we've changed the default Opt-in text and Opt-out text for the preference options to **Opt-in** and **Opt-out**, respectively. Also, the **No preference** message text now displays directly below the option name when no selection has been made.

Name	Value
(Name)	Acknowledgements
Advanced properties	Click here to edit
Communication text	Acknowledgements
CSS class	
Header text	
Mail options text	Send to
No preference text	Not selected
Opt-in column text	
Opt-in text	Opt-in
Opt-out text	Opt-out
Targeting	1 selected

When constituents submit their consent preferences via the Communication Preferences form, those preferences are written immediately to their Blackbaud CRM constituent record and display on the **Communications > Preferences** tab under **Solicit codes**. Consent solicit codes, consent statement, privacy policy, and more consent details are included on the record.

## Service Pack 16

These features were introduced in Service Pack 16 after the original **CRM 4.0** release.

## New Frequency for Recurring Gifts

You can now schedule recurring gifts with the new **Every 4 weeks** frequency. When you add or edit a recurring gift, you can choose this frequency and the gift will be processed every 4 weeks exactly, which

allows you to collect a 13th installment. This new frequency option is supported on the following parts:

- Donation Form
- Advanced Donation Form
- Transaction Manager

One benefit of the new frequency is that it enables donors to schedule an additional installment per year. Previously, donors could select the **Monthly** option, which allowed for a maximum of 12 gift installments per year. The new **Every 4 weeks** frequency option enables users to schedule another installment — for a maximum of 13 — per year.

As with other recurring gift frequencies, the **Every 4 weeks** installment frequency information from donation transactions on these forms in Blackbaud Internet Solutions is downloaded and written to Blackbaud CRM through the Enhanced Revenue Batch.

## Configure the Donation Form

On the Design tab under **Donor gift scheduling options**, select **Allow recurring gifts** to display the recurring gift options.

**Donor gift scheduling options**  
Select which gift scheduling options to make available to donors on this Donation Form.

☒ Allow one-time gifts

☒ Allow recurring gifts Donor selects an amount that is applied on a specified frequency.

Set the method to determine options for recurring gifts.

☐ General

☒ Specific

First select the frequency settings, then click the Add frequency button to add the option to the Donation Form.

**Frequency**

- Weekly
- Monthly
- Quarterly
- Annually
- Every 4 weeks**

☒ Allow donor to enter ending date

- When you select **General**, donors can determine the frequency of the recurring gift. On the Donation Form, they'll now be able to select a giving frequency of **Every 4 weeks**. When they choose this option, donors are required to enter a start date for the recurring gift.
- When you select **Specific**, you define the recurring gift schedules donors can choose. You can now select to include **Every 4 weeks** as the frequency.

**Note:** You can modify the **Every 4 weeks** caption text on the Language tab under the **Recurrence Frequency** category.

## Configure the Advanced Donation Form

When creating your custom donation experience using the Advanced Donation Form part, you can now include HTML for a frequency option value of **Every 4 weeks** for recurring gifts. For more information about designing the form, see the [Advanced Donation Form Developer Guide](#).

## Configure the Transaction Manager

On the Design tab under **Recurring gift updates**, select **Allow frequency updates** to display the recurring gift options.

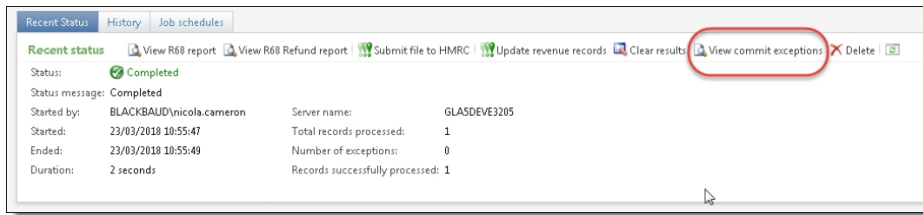
- When you select **General**, donors can determine the schedule for their recurring gift payment. On the Transaction Manager, donors can now select a giving frequency of **Every 4 weeks** when making changes to their recurring gift. When they choose this option, donors are required to enter a start date for the recurring gift.
- When you select **Specific**, you define recurring gift schedules for donors to select from. You can now select to include **Every 4 weeks** as the frequency.

**Note:** You can modify the **Every 4 weeks** caption text on the Language tab under the **Recurrence Frequency** category.

## Gift Aid R68 Commit Exceptions

To help you troubleshoot Gift Aid R68 process exceptions, we have added a new option to review commit exceptions. On the Recent Status tab of the R68 screen, you can access the new 'View commit exception' option.



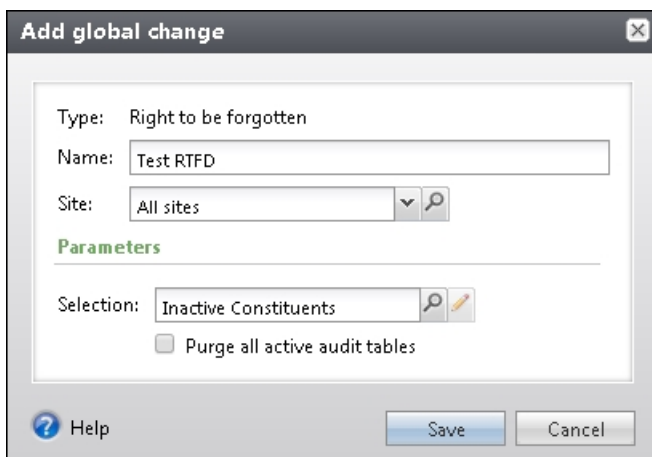


When you select this option, you see a new screen where you can see the Revenue ID affected by the exceptions and drill into details about the reasons for the exceptions.

## Right to Be Forgotten Global Change

We have added a new global change to help you honor constituent requests to remove their history from your database. As part of the General Data Protection Regulation (GDPR) that affects constituents in the United Kingdom, constituents can request to have their entire history removed from your database. After you remove their record, you can run this global change to purge any data related to the constituent from your audit tables.

The new global change is called Right to be forgotten.



Use a selection to purge audit data from any constituents who have requested to be removed from your database. To also purge active audit tables for those constituents, select the "Purge all active audit tables" checkbox.

## Acquisition Form Part

The new Acquisition Form part in BBIS enables your organization to collect constituent information — personal data, constituent attribute information, and communication consent preferences — without requiring constituents to register or log in to your site. You can then download the data to your constituent database in Blackbaud CRM via the Constituent Update Batch process.

**Note:** Consider using the new Acquisition Form part — instead of the Email Signup Form — to capture email signups going forward. The Email Signup Form will be deprecated in a future release.

Use the **Design** tab to configure the form and customize it for your organization. Under **General Properties**, enter a **Form Title** that will display to web site users — for example, *Join Our Mailing List*. You can also add a **Form Description** that displays below the form title to provide more information.

Under **Fields**, enter a **Title** for the fields section that displays on the form, and then select which fields to include and whether they are required. The minimum required fields — **Last Name** and **Email Address** — are selected by default and cannot be modified.

**Fields**

Title:  Enter a field title to appear on the web page.

Select the fields to include in your form.

	Include	Field Name	Label	Required
⋮	<input checked="" type="checkbox"/>	Title	<input type="text" value="Title"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	First Name	<input type="text" value="First Name"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Middle Name	<input type="text" value="Middle Name"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Nickname	<input type="text" value="Nickname"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Maiden Name	<input type="text" value="Maiden Name"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Last Name	<input type="text" value="Last Name"/>	<input checked="" type="checkbox"/>
⋮	<input type="checkbox"/>	Suffix	<input type="text" value="Suffix"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Email Address	<input type="text" value="Email Address"/>	<input checked="" type="checkbox"/>
⋮	<input type="checkbox"/>	Confirm Email Address	<input type="text" value="Confirm Email Address"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Email Address Type	<input type="text" value="Email Address Type"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Address	<input type="text" value="Address"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Address Type	<input type="text" value="Address Type"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Phone Number	<input type="text" value="Phone Number"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Gender	<input type="text" value="Gender"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Class of	<input type="text" value="Class of"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Birth Date	<input type="text" value="Birth Date"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Lookup ID	<input type="text" value="ID"/>	<input type="checkbox"/>

You can change the order in which the fields display on the form by selecting the field's row and dragging up or down in the list.

Under **Attributes**, enter a **Title** for the constituent attributes section that displays on the form. Then, select which constituent attributes from Blackbaud CRM to **Include** on the form and whether they are **Required** fields. Typically, you display attributes when you have multiple options and you want users to subscribe to emails that match their preferences. Constituent attributes are not required to configure the form, but is recommended to comply with email opt-in best practices.

**Attributes**

Title:  Enter an attribute title to appear on the web page.

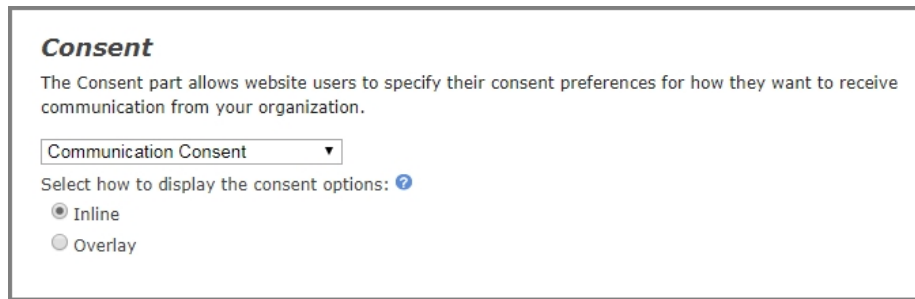
Select the constituent attributes to display during the Acquisition process.

Constituent attribute options

	Include	Field	Caption	Required
⋮	<input checked="" type="checkbox"/>	Availability	<input type="text" value="Availability"/>	<input type="checkbox"/>
⋮	<input checked="" type="checkbox"/>	Origin	<input type="text" value="Origin"/>	<input type="checkbox"/>

**Note:** Only those constituent attributes you enabled in *Sites & settings* that have a type of **Yes/No**, **Table**, and **Text** are available to display on the form.

Under **Consent**, to enable users to specify their consent preferences for how they want to receive communication from your organization, choose an existing Consent part to include on the form. You can specify how you want the consent preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.



**Consent**

The Consent part allows website users to specify their consent preferences for how they want to receive communication from your organization.

Communication Consent ▼

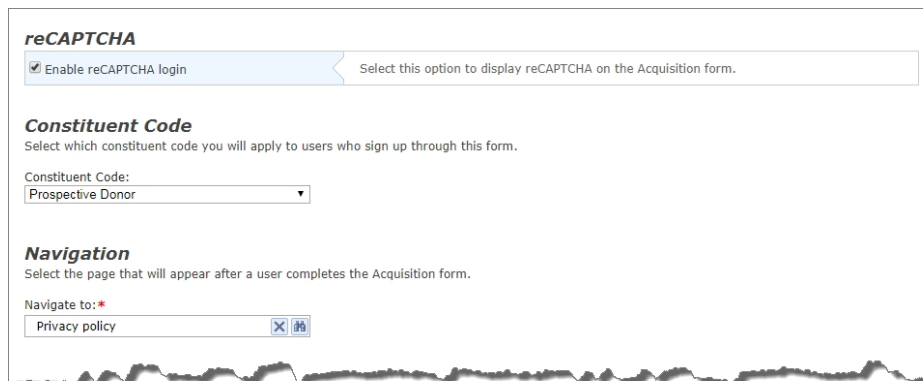
Select how to display the consent options: ?

☒ Inline

☐ Overlay

To ensure users are not automated programs to generate spam or phish for information, select **Enable reCAPTCHA login** to display reCAPTCHA on the Acquisition Form. You can also optionally specify a **Constituent Code** from Blackbaud CRM to apply to users who sign up using the form.

Under **Navigation**, select the web page to display to users when the form is completed. Select the binoculars to display the list of pages on your site to choose from. This field is required.



**reCAPTCHA**

☒ Enable reCAPTCHA login Select this option to display reCAPTCHA on the Acquisition form.

**Constituent Code**

Select which constituent code you will apply to users who sign up through this form.

Constituent Code:  
Prospective Donor ▼

**Navigation**

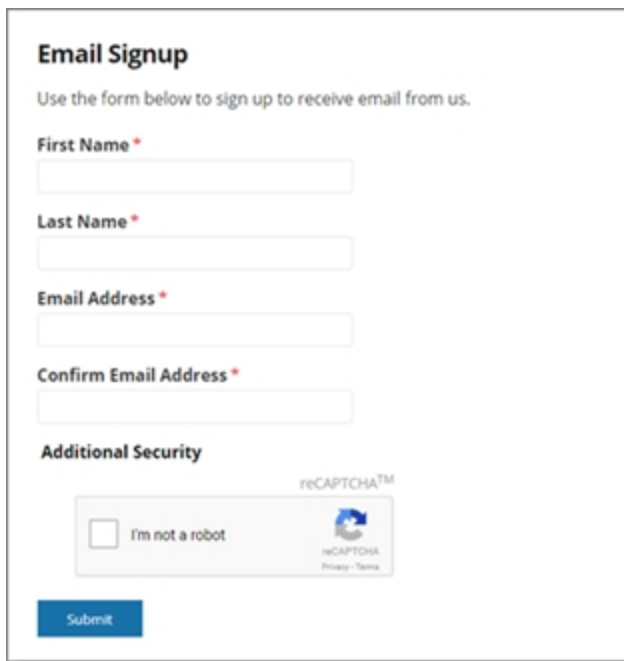
Select the page that will appear after a user completes the Acquisition form.

Navigate to: \*

Privacy policy [X] [🔍]

As a last step, select **Acknowledgment Email** to configure the confirmation email to display after users submit the form. The **Name of email**, **Subject**, **From address**, and **From name** fields are required. You can edit the default text for the email message.

Here's an example of how the Acquisition Form displays on your website:



**Email Signup**

Use the form below to sign up to receive email from us.

First Name \*

Last Name \*

Email Address \*

Confirm Email Address \*

Additional Security

☐ I'm not a robot

reCAPTCHA™

Submit

To enable you to download transactions from the new Acquisition Form, we've made some enhancements in Blackbaud CRM for batch assignments. The **Signup** transaction type is now called **Signup/Acquisition**, and there is a new **Acquisition** transaction type. So, you can choose which transactions — either **Signup**, **Acquisition**, or both — to include in the batch assignment.

Transactions from the Acquisition Form are downloaded to the Constituent Update Batch. When you commit the batch, data captured on the Acquisition Form is written to the constituent's record — the record is created for new constituents and updated for existing constituents.

**Note:** Any existing Signup batch will have its **Transaction type** automatically changed to **Signup/Acquisition** and its **Include transaction type** option set to **Signup** by default. You can edit any of these batch assignments to also include the **Acquisition** transaction type.

## Service Pack 17

These features were introduced in Service Pack 17 after the original **CRM 4.0** release.

## Advanced Consent Solicit Codes

We have added a new additional consent type called "Advanced consent." This consent type is designed to give you the same specialized options that were previously only available for "EU Consent" types. We introduced the "EU Consent" solicit code type to accommodate compliance with General Data Protection Regulation (GDPR) requirements. However, you can take advantage of the detailed information in this type of solicit code by using the "Advanced consent" type, even if you are not in the European Union. Advanced consent solicit codes work identically to EU consent solicit codes and are available in all the same product areas: Constituent Solicit Code view, Query, Blackbaud Data Warehouse, Marketing and

Communications, Batch (including Enhanced Revenue Batch), Channel Opt-out, Constituent Merge, and Global Change.

# Site Security for KPIs on the Blackbaud Data Warehouse

We have added site security to Key Performance Indicators (KPIs) in the Blackbaud Data Warehouse. When you add a KPI, you now see the new "Sites" tab. When you select the "Site filter enabled" checkbox, the KPI can be secured by site by adding the relevant sites on that tab.

# Event Registration Form Enhancements

To streamline the user experience when registering for a single event on the Event Registration form, we've added the following enhancements to the form.

## Single events with one ticket type

When there's only one event configured on the Event Registration form — and there's only one ticket type — the number of attendees is automatically pre-populated for the ticket type. This enables the registrant to quickly proceed through the registration process for a single event without having to manually enter information.

In addition, because selecting events is not necessary when registering for a single event with one ticket type, the **Select events** tab doesn't display. Each attendee is automatically registered for the single event.

## Single events with multiple ticket types

When there's only one event configured on the Event Registration form — and there are multiple ticket types — the **Select events** tab still displays but is used only to select the ticket type of each attendee.

Event

Ticket Type	Price	Quantity
Non-member (1 person per ticket)	\$100	<div></div>
Member (1 person per ticket)	\$10	<div></div>

Add Attendee

Subtotal: \$0

Next

Cancel

## First attendee automatically selected as host on Checkout page

To save registrants mouse-clicks when specifying billing information for an event, the first named attendee displayed on the Attendees page is now automatically listed as the host on the Checkout page.

With this enhancement, Blackbaud Internet Solutions assumes that the first attendee is paying for the event, and pre-populates that person's contact information for billing on the Checkout page.

Register for the Class of 1999 Reunion Dinner on September 20th in the Campus Ballroom!

Attendees Select events Checkout

Required fields are marked with an asterisk (\*)

Jake Smith

Jane Smith

Add attendee

Continue

Register for the Class of 1999 Reunion Dinner on September 20th in the Campus Ballroom!

Attendees Select events Checkout

Required fields are marked with an asterisk (\*)

Billing Information

☒ Use an attendee's contact info for billing.

Jake Smith

Total due: \$115

Not Jake Smith? [Click here to clear form](#)

First Name Surname \*

Jake Smith

Email type:

Business

Email \*

Total due: \$115

Previous Continue

You still have the option to select a different attendee as the host from the drop-down list of attendees. If the host is not attending the event—but is being billed for it—you can select **Click here to clear the form**, then enter the host's contact information.

**Note:** An unnamed attendee cannot be recognized as a host.

## Total amount due added to top of Checkout page

To enable registrants to view the total amount due for events without having to scroll down on the Checkout page, the **Total due** amount is now shown both at the top and at the bottom of the page.

Register for the Class of 1999 Reunion Dinner on September 20th in the Campus Ballroom!

Attendees Select events Checkout

*Required fields are marked with an asterisk (\*).*

### Billing Information

☒ Use an attendee's contact info for billing

Jake Smith

Total due: \$115

Not Jake Smith? [Click here to clear form](#)

First Name Surname \*

Jake Smith

Email type:

Business

Email \*

Total due: \$115

Previous Continue

## Ability to include event information on the form

To enable you to provide users with introductory text about a single event directly on the Event Registration form, we've added a WYSIWYG editor to the part's Design tab. Now, you can include event information — using event merge fields or by creating custom content — at the top of the Event Registration form.

Design Helplets Language Properties Usage Targeting & security Tags

### ▼ Event introductory text

Formatting Insert View Image

Cut Copy Paste

Font family Font size

Find and replace Paragraph Remove formatting

EventName

Event Description

Event Location

Event Date

Event Price

Path: p

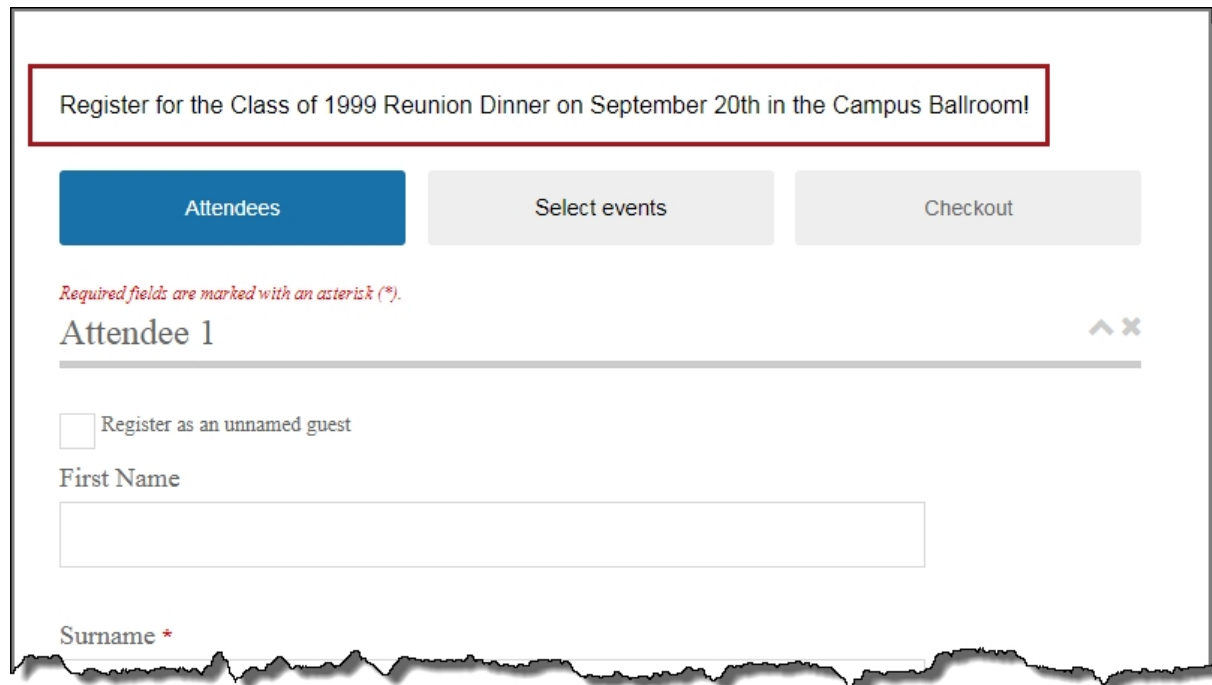
[Restore default content](#)

### Add events

Event name	Event date	Actions
<input type="button" value="Add an event"/>		

On the Design tab for the Event Registration form part, there's a new **Event introductory text** section. You can use this WSIWYG editor to specify information to include at the top of the form. By default, the merge fields **EventName**, **Event Description**, **Event Location**, **Event Date**, and **Event Price** are included. You can apply styling, add additional custom content, or remove any of the merge fields.

The introductory text displays to users at the top of Event Registration form above the registration steps.



Register for the Class of 1999 Reunion Dinner on September 20th in the Campus Ballroom!

Attendees Select events Checkout

*Required fields are marked with an asterisk (\*).*

Attendee 1 ^ x

☐ Register as an unnamed guest

First Name

Surname \*

## Giving Data on Wealth Calculations

You can now include external giving data in the wealth capacity calculation. The Add and Edit Capacity Formula screens now include a Giving tab that you can use to specify one or more types of data to include in the calculation. Philanthropic gifts use giving data from NOZA™ and DonorBank™. Political donations use giving data from Federal Election Commission (FEC). For the Philanthropic and Political donation settings, you can select which data sources to include, select whether to include only confirmed sources, and customize the mathematical formula.

You can see major giving capacity basis on the prospect's Wealth Summary tab, under **Giving capacity**.

## Support for Advanced Consent Solicit Codes

Blackbaud CRM has added a new Advanced Consent solicit code type which is similar to the EU Consent solicit code type, but is more applicable for non-EU customers. To support this new code type and enable you to collect Advanced Consent solicit codes configured in Blackbaud CRM, we've made several enhancements to the Communication Preferences form.



## New Advanced consent solicit codes element

The new **Advanced consent solicit codes** element lists advanced consent solicit code options, enabling constituents to explicitly opt-in or opt-out of a specific communication channel. You can configure which advanced consent solicit codes to include on the form by using the Element tab in the Properties pane. Select **Advanced properties**, then specify the advanced consent solicit codes from Blackbaud CRM you want to include on the form, the text to display for each code, and which codes require a consent selection.

The screenshot displays the Blackbaud CRM form configuration interface. On the left, the 'Add fields' pane shows a list of form elements under the 'Communication preferences' category. The 'Advanced consent solicit codes' element is highlighted with a red box. A red arrow points from this element to the main form area. The main form area shows a configuration for the 'Advanced consent communication' element. It includes a section titled 'Advanced consent communication' with a description: 'Please select the channels you would like to be communicated through by Blackbaud'. Below this, there are two rows of radio buttons for 'Email\_Ad' and 'Email3\_ADV', each with 'Opt-in' and 'Opt-out' options. The 'Opt-in' option is selected for both. There are also sections for 'Directory messages' and 'Consent communication' with similar radio button options. The 'Send to' dropdown menu is set to 'Mail'.

## Consent solicit code element renamed

In this release, we've renamed the previous **Consent solicit code** element to **EU consent solicit codes** to be consistent with the solicit code's naming convention used in Blackbaud CRM.

## Email opt-out element

With this release, you can now select any solicit code, consent solicit code, or advanced consent solicit code to use for the global **Email opt-out** element.

**Note:** The **Solicit codes**, **EU consent solicit codes**, and **Advanced consent solicit codes** elements are only available to include on the Communication Preferences form if there are corresponding solicit code types configured in Blackbaud CRM.

## Consent Data written to Enhanced Revenue Batch

To provide consistency with the consent solicit code functionality in the Constituent Update Batch, consent information collected from donation transactions in Blackbaud Internet Solutions is now written to Blackbaud CRM through the Enhanced Revenue Batch.

Blackbaud CRM has added solicit code batch support — similar to the solicit code functionality in the Constituent Update Batch — to the Enhanced Revenue Batch. Previously, consent information from donations was written into a Blackbaud CRM constituent record as a business process. With this enhancement, consent preferences specified in Blackbaud Internet Solutions donation transactions on the Advanced Donation form, Donation form, and Payment 2.0 part are now included in the Enhanced Revenue Batch. Once the batch is committed, the consent preferences are written to the constituent records in Blackbaud CRM.

## Custom Validation for Direct Debit Payment Fields

To resolve issues with direct debit validation for countries other than the United States and Canada, we've made enhancements to the direct debit validation on the Donation Form and Payment 2.0 Form. Previously, the routing number field only validated 9-character US/Canada routing numbers, which was causing issues for BSB, SEPA, and other banking types that have other character validation requirements.

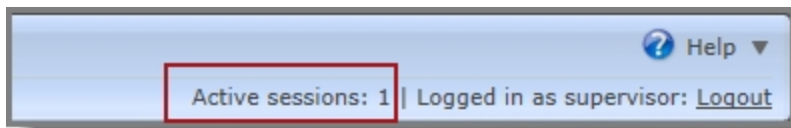
Now, with this enhancement, direct debit payment fields are labeled using the captions set in Blackbaud CRM Banking Systems, and are driven by the banking systems enabled for your organization. A new **Banking System Type** field enables donors to select another banking type — if more than one banking system type is enabled in Blackbaud CRM, or if Australia is selected as the donor country together with the USA banking system. The **Routing Number** field name changes to reflect the selected banking type. For example, if **BSB** is the selected banking type, the **Routing Number** field displays as **BSB Number**. The information users enter in this field is then correctly validated in accordance with the selected banking type.

## Service Pack 18

These features were introduced in Service Pack 18 after the original **CRM 4.0** release.

## Concurrent Sessions

Blackbaud Internet Solutions now displays the total number of concurrent active sessions for users with administrative rights. An active session is defined as a login from a unique IP address. For example, if you are logged into Blackbaud Internet Solutions from your work computer and from your home computer at the same time, the display will show that there are 2 active sessions. Logins from multiple browsers on the same computer are not considered as separate active sessions.



## Donation Form now WCAG 2.0 AA Compliant

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that the Donation Form part now meets the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

## reCAPTCHA Key Validation

To resolve integration issues with Blackbaud Internet Solutions that resulted from updates to reCAPTCHA, we've added the ability for administrators to validate their reCAPTCHA keys.

In **Administration, Sites & settings**, under **reCAPTCHA**, you can now verify that the public and private keys that you enter are correct. After you configure or update the keys, click the **Validate** button. The reCAPTCHA challenge displays, and once you've completed the challenge, a message displays to let you know whether or not the keys are valid.

**reCAPTCHA**  
After configuring or updating the keys, click on "Validate" below, to verify that the keys are correct.

Public key: 6Ldn4ikTAAAAANciP8iX93YV8HTUkof6O\_wBrZAZ [What is reCAPTCHA?](#)

Private key: .....

**Validate**

reCaptcha: Successfully validated.

Usage:

- ☒ Non-donation eCards
- ☐ Anonymous and provisional users when processing a payment
- ☐ Non-provisional authenticated users when processing a payment
- ☐ New user registrations

## jQuery Version Upgrade

With this release of Blackbaud Internet Solutions, we have upgraded the jQuery version from 1.12.3 to 3.3.1. If you use custom JavaScript on your Blackbaud Internet Solutions pages, we recommend additional testing to ensure this has not affected your user experience.

## Enqueue for Credit Card Processes

You can now start a credit card process at any time, even if another business process is running. Through the enqueue process, your credit card process is queued up automatically if it cannot be run immediately. Then, the system runs the process as soon as possible. Previously, if you tried to run a credit card process while another business process was running, you received an error.

You can see all the enqueued jobs on Enqueue tab on the Business Processes page in *Administration*. Before business processes can be enqueued, you must enter the credentials of a system administrator user that will be used to run the processes. The **Edit enqueue settings** task is on the Business Processes page in *Administration*.

## Upgraded HTML Editor in Marketing and Communications

We have upgraded the HTML editor available in *Marketing and Communications* to the most recent version (TinyMCE version 4). One of the most important benefits of this upgrade is that the editor now includes the HTML `<head>` tag that's necessary for creating responsive design. With responsive design, your emails display optimally on any device—desktop, tablet, or smart phone. This new version automatically adds the `<head>` tag in the HTML source code, where you can include elements such as scripts, styles, and meta information.

## Service Pack 19

These features were introduced in Service Pack 19 after the original **CRM 4.0** release.

## Reduce Recognition Credits When You Write Off a Pledge

When you globally write off pledges, you now have the option to reduce recognition credits. Previously, you could only reduce recognition credits when you manually wrote off a pledge.

The **Add a pledge write-off process** option under *Revenue* now includes a **Recognition credits** section, similar to the one found on the one-off write-off form. There, you can choose whether to reduce recognition credits and how.

**Add a pledge write-off process**

**General**

Name:

Description:

Selection:

Post status:

Post date:

Site:

**Write-off reason**

Reason code:

Details:

**Recognition credits**

☒ Reduce recognition credits by proportional amount

☐ Reduce recognition credits by write-off amount

☐ Do not adjust recognition credits

**Output**

☐ Create output selection

☐ Overwrite existing selection

Selection name:

Help

## Start Date on Add Constituent Attribute Global Change

The Add Constituent Attribute global change now includes a start date. This allows you to indicate a specific start date for any attribute that you add globally.

**Add global change**

Type: Add constituent attribute

Name:

Site:

**Parameters**

Selection:

Category:

Value:

Start date:

End date:

Comment:

☒ Overwrite existing values

☐ Remove attribute from unqualified records

Help

## Blackbaud Checkout Enhancements

To enable organizations to customize the theme on the Blackbaud Checkout page, we've implemented a new option in **Sites & settings**. Because some organizations have branding guidelines that must be followed, this enhancement allows administrators to change the font and colors on the Blackbaud Checkout page to match your organization's brand. You can specify a theme to use site-wide and you can also override the site-wide theme on individual forms.

Under *Administration, Sites & settings*, you can select the site you want to customize the Checkout page for, then select the **Settings** tab.

In **Blackbaud Checkout Theme Options**, you can specify the default colors to use as the **Primary color** and **Secondary color** for the Checkout page used on your site. You'll need to enter the 6-digit

hexidecimal value — such as #FF0000 — for the desired color. In **Font**, you can change the default font (Roboto) for text displayed on the Checkout page by selecting from the list of available fonts.



**Blackbaud Checkout Theme Options**

Colors and Font

Primary color

Secondary color

Font

Enter a six-digit hexadecimal value (ex: #FF0000) to use for the **Primary color** and **Secondary color** on the Checkout payment page. Select a **Font** to use for the page's text. Refer to the [help](#) for details.

On the Checkout page:

- **Primary color** is used on form buttons, the footer, and field highlights
- **Secondary color** is used for the background of validation errors
- **Font** is used for the header text, footer text, and all content

When the administrator has configured the Blackbaud Checkout theme, all checkout overlays displayed from anywhere on the site will display the font, primary color, and secondary color that were specified, unless you've overridden the site-wide defaults on an individual part.

## Enhancements to the Donation Form - Mini Part

In this release, we've made several enhancements to the Donation Form - Mini part.

### Support Apple Pay

Apple Pay is now available to donors as a secure checkout option.

Previously, this was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.

### Removed "Beta" Designation from Part Name

The Donation Form - Mini part is no longer in beta status. We've removed "Beta" from the part name to reflect this.

### Donation Form - Mini is now AA Compliant

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that the Donation Form - Mini part now meets the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

### Checkout Page — Separate First Name and Last Name Fields

Constituent records in Blackbaud CRM use separate **First Name** and **Last Name** fields. Previously, Blackbaud Internet Solutions used a single Cardholder Name field for Blackbaud Checkout, which resulted in matching issues in Blackbaud CRM. Since Blackbaud Checkout allows the Cardholder Name to



be collected as a separate first name and last name, Blackbaud Internet Solutions will now always use these separate fields for data accuracy.

## Checkout Page — Customize Page Theme and Digital Wallets

On the Design tab, when you select a merchant account under **Payment setup** that supports Blackbaud Checkout, you'll see the **Use site defaults for Blackbaud Checkout Theme** option. This setting is selected by default, and refers to the **Blackbaud Checkout Theme Options** specified in *Administrator > Sites & settings*.

To override the site-wide default checkout theme, clear the **Use site defaults for Blackbaud Checkout theme** option to enable the fields where you can enter values for the **Primary color** and **Secondary color**, and select a different font.

**Payment setup**

Merchant account: \*  
 Merchant Account ▼

Select the merchant account to use to process donation transactions.  
 Note: Unsupported accounts will appear disabled in your merchant account list. Refer to [documentation](#) for more information.

☒ Use site defaults for **Blackbaud Checkout Theme**

Colors and Font

Primary color:

Secondary color:

Fonts:  ▼

Enter a six-digit hexadecimal value (ex: #FF0000) to use for the **Primary color** and **Secondary color** on the Checkout payment page. Select a **Font** to use for the page's text. Refer to the [help](#) for details.

Digital Wallets

☒ All ☒ Visa Checkout ☒ MasterPass

In addition, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout or MasterPass — are accepted during checkout. By default, all payment methods are selected.

**Note:** Digital wallets are only available for BBMS customers.

## Event Registration Form Enhancements

We've made the following enhancements to the Event Registration Form 2.0.

### Blackbaud Checkout

Previously, the Blackbaud Secure Payment page was used to take payments through the Event Registration Form 2.0. Now, the form uses PCI-compliant Blackbaud Checkout *for BBMS customers*, so credit card and merchant account information is processed and stored on a Blackbaud-hosted secure server.

On the Design tab, when you select a merchant account under **Payment options** that supports Blackbaud Checkout, you'll have the option to specify the checkout theme. You can use the default option — **Use site defaults for Blackbaud Checkout Theme** — which uses the settings specified in the **Blackbaud Checkout Theme Options** specified in *Administrator > Sites & settings*.

To override the site-wide default checkout theme and customize the checkout theme, clear the **Use site defaults for Blackbaud Checkout theme** option to enable the fields where you can enter values for the **Primary color** and **Secondary color**, and select a different font.

Merchant account: \*  
 Merchant Account ▼ Select the merchant account to use to process event transactions.

☒ Use site defaults for **Blackbaud Checkout Theme**

Colors and Font  
 Primary color:   
 Secondary color:   
 Fonts: Roboto ▼ Enter a six-digit hexadecimal value (ex: #FF0000) to use for the **Primary color** and **Secondary color** on the Checkout payment page. Select a **Font** to use for the page's text. Refer to the [help](#) for details.

Digital Wallets  
☒ All ☒ Visa Checkout ☒ MasterPass

**Additional payment fields**  
 Select the additional payment fields to display on the *Blackbaud Secure Payments* form.

Field	Include
reCAPTCHA	<input checked="" type="checkbox"/>

In addition, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout or MasterPass — are accepted during checkout. By default, all payment methods are selected.

**Note:** Digital wallets are only available for BBMS customers.

# Per Pricing Option Limits

To enable administrators to limit the number of registrations per ticket option for an event, you can now configure per pricing option limits.

When you edit an event, under **Event price options**, there's a new **Max units** setting. Use this setting to select the maximum number of tickets for the event option.

Name: \*  
 Eventfree Enter the event information to appear on the web page.

Description:

☐ Use event capacity Select this option to use the event capacity from *Blackbaud CRM* as the registration limit. The event's capacity is 0.

**Event price options**  
 Select the event types to include on the web page and enter information for each type. The types appear on the page in the same order that they appear in the grid. To reorder them, drag the dotted button.

Type	Include	Name	Price	No. registrants	Max units
General	<input checked="" type="checkbox"/>	General	\$0.00 USD	1	4 ▼

**Registrant options**  
 To select registrant options for each event type you include on the web page, click the arrow beside it. Types in this grid appear as the original default regardless of your selections in the *Event price options* grid. For example, when you remove a type or reorder the list in the *Event price options* grid, it

For example, if you set the **Max units** to 4, registrants cannot register more than four people for that event option. A message displays if there is a maximum ticket limit when registrants add attendees for an event.

You can use the **Language** tab to customize text that displays on the form. For example, you can modify the text for the **Maximum registrants per pricing option** item to customize the message displayed for the per pricing option limit for a ticket type.

## Remove Unengaged Users When Sending Emails

To enable you to remove unengaged users — those who haven't interacted with an email via an open or a click in a specified period of time — from emails sent through Blackbaud Internet Solutions, we've made an enhancement to the email settings.

On the **Schedules** tab in *Administration > Sites & settings*, we've added **Inactive email recipient list refresh** settings that enable administrators to set the frequency that the business process will run to remove email addresses that have been inactive for the specified number of months.

In *Email > Inactive recipients*, you can see a list of email addresses for inactive recipients, based on the criteria specified in the **Inactive email recipient list refresh** settings in *Administration > Sites & settings*. The value displayed in **Inactive from month(s)** defaults to the value specified in *Administration > Sites*

& settings, but you can modify it to change the filter criteria. The **Date of last open** and **Date of last click** for each email address is also displayed.

**Inactive recipients**

In *Inactive recipients*, you can view email addresses that are not engaged with you. Blackbaud Internet Solutions no longer sends email to these addresses.

Email address:  Inactive from month(s):

Email address	Date of last open	Date of last click
1113407@my.brunel.ac.uk		
19.cas.93@gmail.com		
a.besson@qmul.ac.uk		
a.de'ath@ucl.ac.uk		
a.fisher@ioe.ac.uk		
a.hervieu-causse@warwick.ac.uk		
a.servante@uclmail.net		
a.shahthomas@hotmail.com		
a.tsiokris@gmail.com		
a_driesslein@hotmail.com		

Showing 10 of 915 results

1 2 3 4 5 ... 92 Next

When you create a new message in *Email > Messages*, you can select the **Exclude inactive recipients** option and specify the number of months (**Inactive from month(s)**) that recipients have been inactive. The value displayed in **Inactive from month(s)** defaults to the value specified in *Administration > Sites & settings*, but you can modify it. When you select **Send Final**, the email will not be sent to the inactive recipients that meet the specified criteria.

**Already Linked User Email (New) (New message)**

Recipient lists:

Test lists:

Test emails:

Name of email:  \* Issue date: 17/01/2019 02:19:31

Subject: A Message From Organization \*

From address: admin@organization.org \* From name: Organization \*

Send after date: 17/01/2019 02:19:31

Exclude inactive recipients: ☒ Inactive from month(s):

Business process last run: 17/01/2019 00:00

[More options...](#)

Insert View Table

Verdana 11pt Paragraph

Dear  ,

Thank you for your online registration. However, our records indicate that you previously registered using the below information:

User ID:

Password:

You can also select the **Exclude inactive recipients** and **Inactive from month(s)** options on email templates. This enables you to configure these settings on a template, and then any email messages created from the template will default with the values from the template.

**Tip:** For more information about unengaged/inactive users, see the [Engagement and Email Deliverability Resources](#) blog post.

## Event Batch Control Report Updates

To enable the Blackbaud Internet Solutions Event Batch Control report to provide applicable information for finance reconciliation and other processes, we've updated the report to include more details.

Previously, when you created the Blackbaud Internet Solutions Event Batch Control report after committing an event registration transaction batch, the only information displayed in Blackbaud CRM was the registrant name. Now, the report includes the batch summary details, and records containing information about registrants and registered events are displayed.

Blackbaud Internet Solutions Event Registration Transaction Batch Control Report									
Batch number: 63		Projected #: 0		Projected total: \$0.00					
Status: Committed		Committed #: 1		Current total: \$20.20					
Owner: BLACKBAUD/Atul Sharma									
Exception batch number:		Payments: 1		Total payments: \$20.20					
		Pledges: 0		Total pledges: \$0.00					
Constituent Lookup ID	Constituent Name	Date	Amount	Designation	Appeal	Payment Method	Revenue Type	Event	# of Registrants
8-10000506	Max Johnson	2018/11/20	20,2000		Appeal1	Credit card	Event Registrations	Event1	1
<div>11/20/2018 at 8:48 PM</div> <div>Prepared by: BLACKBAUD/Atul Sharma</div> <div>Page 1 of 1</div>									

## WCAG 2.0 AA Compliant Forms

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that Donation and Membership forms using the Payment 2.0 part, as well as the Mini Donation Form, now meet the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

## Globally Delete a Constituent Attribute Based on the Attribute Value

To help you narrow down what you want to delete, you can now select specific attribute values to delete in the **Delete a Constituent Attribute** global change. Previously, the global change deleted all the attribute values. Now, you can select between two options.

- **Delete all values:** This option works the same way as the global change worked before this release. When you run the global change, all attribute values are deleted for the constituents selected.
- **Delete only attributes with the value:** When you select this option, you can narrow down the values deleted by the global change.

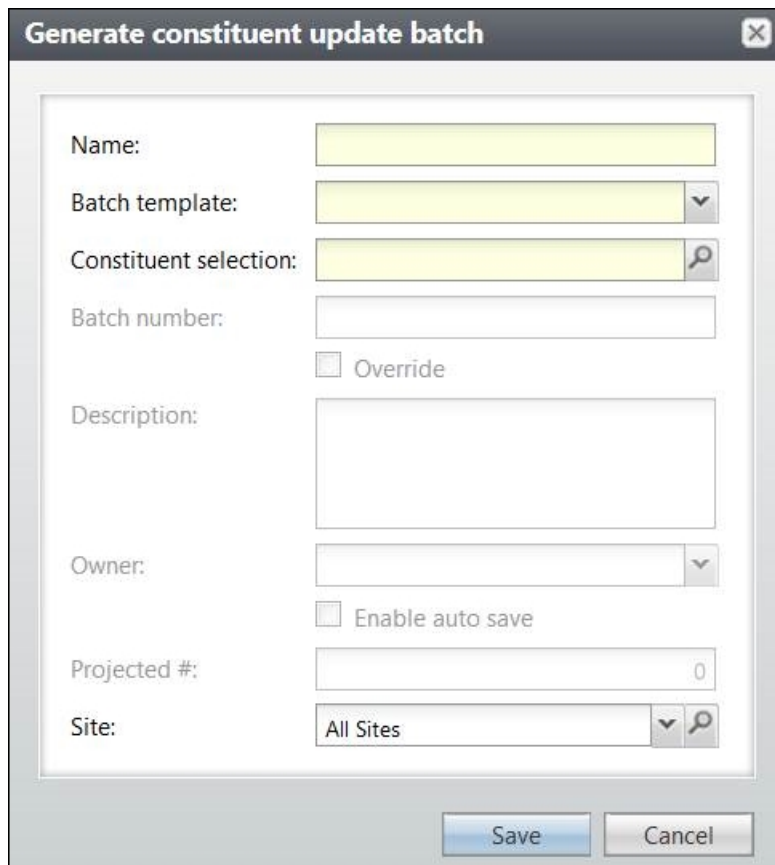
## Service Pack 20

These features were introduced in Service Pack 20 after the original **CRM 4.0** release.

### Generate Constituent Update Batch

To help you save time and minimize errors, you can now generate a Constituent Update Batch from *Constituents*. This allows you to select a Constituent Update Batch template and create a Constituent Update Batch using the records on a selection you choose. This can be helpful, for example, if you need to add or update constituents following an event or other situations where you have a specified list of constituents you need to update.

To access this option, under *Constituents*, select **Generate constituent update batch** under **Maintenance**.



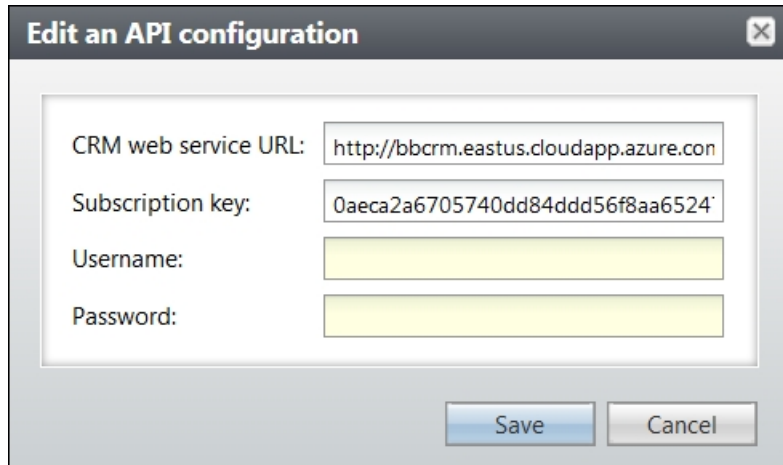
The screenshot shows a dialog box titled "Generate constituent update batch". It contains the following fields and controls:

- Name:** A text input field.
- Batch template:** A dropdown menu.
- Constituent selection:** A text input field with a search icon.
- Batch number:** A text input field.
- ☐ **Override**
- Description:** A large text area.
- Owner:** A dropdown menu.
- ☐ **Enable auto save**
- Projected #:** A text input field with the value "0".
- Site:** A dropdown menu with the value "All Sites" and a search icon.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

### API Configuration

We have extended our API capabilities to provide access to open, industry-standard REST APIs. These APIs allow you to customize, integrate, or extend the functionality of **Blackbaud CRM**.

To take advantage of this capability, you must create a **Blackbaud CRM** API developer account and obtain a subscription key. Then, you must set up the connection to the API. Under *Administration*, select **API Configuration**. On the API Configuration page, select **Edit configuration**.



**Edit an API configuration**

CRM web service URL:

Subscription key:

Username:

Password:

On this screen, you enter your web service URL and the subscription key you received, and add your credentials.

**Blackbaud CRM** 4.0 Service Pack 20 includes the ability to establish the API connection, but not access to the API itself. Throughout the second quarter of 2019, Blackbaud will contact Service Pack 20 adopters directly to begin onboarding them into the API.

## Globally Delete Constituent Attributes Based on Attribute Value

When you configure the global change to delete constituent attributes, you can now select whether you want to delete all values or only attributes with a specific value.

**Add global change**

Type: Delete constituent attribute

Name:

Site:

**Parameters**

Selection:

Category:

☐ Delete all values

☒ Delete only attributes with the value:

Value:

Under **Parameters**, you can now select your delete options. To delete a specific value, choose a category, then select **Delete only attributes with the value:** and choose a value.

To create a global change, under *Administration*, select **Global changes** under **Data**. The **Delete constituent attribute** global change is under the **Constituent** category.

## Email Reports about Unengaged Users

New email reports will now show data about unengaged recipients. This enables you to better understand unengaged users — those who haven't interacted with an email via an open or a click in a specified period of time.

Previously, these were also known as "inactive" recipients. Therefore, we've updated the terminology throughout the user interface to now use the term "unenaged" instead of "inactive."

However, email reports which existed prior to this release remain unchanged and will not show this new data.

**Tip:** For more information about unengaged/inactive users, see the [Engagement and Email Deliverability Resources](#) blog post. A previous update enabled you to choose to exclude unengaged users from emails. For information about the previous update, see [Remove Unengaged Users When Sending Emails on page 291](#).



## Additional Bounce Statuses

This release includes additional bounce statuses. These provide users with more information about email addresses which were blacklisted due to spam complaints and emails previously marked as hard bounces.

When you review unengaged recipients (who have inactive addresses), these additional bounce statuses now appear in the list of emails that were not sent. You can filter the list based on these new statuses.

New bounce statuses also appear with the inactive email address on a recipient's contact record and in the **Blacklisted Email Addresses** tab in **Blackbaud CRM**.

For information about bounced emails and best practices for emails, refer to [Blackbaud's Email Resource Center](#).

## Constituents to Review Spam Complaints

You can add a new element to the **Communication Preference Form** to enable online constituents whose email address is associated with a spam complaint to review their email address and learn how to remove their email address from the blacklist.

When you include the **Spam Compliance** element on the **Communication Preference Form**, the form will show an icon and a customizable message to inform the individual that their email address previously reported spam and thus emails can't be sent to that address for compliance reasons. The element also includes a customizable message and URL to a **Blackbaud KnowledgeBase** article which provides instructions which the user can follow to remove the user's email address from the email suppression list.

Additionally, this release helps organizations respect a recipient's right to unsubscribe. When a recipient opens an email in a supported email browser, an unsubscribe link can appear near the top of the email. The recipient can select the link to indicate the individual wants to globally unsubscribe from all emails sent by your organization. Recipients who unsubscribe are marked as not wanting emails and are handled as though the recipient had unsubscribed (globally) from the **Blackbaud Internet Solutions** communication preference form.

## Unsent Email for a Constituent

In **Blackbaud CRM**, the **Communications** tab of a constituent record will now indicate that an email your organization intended for the constituent was not sent.

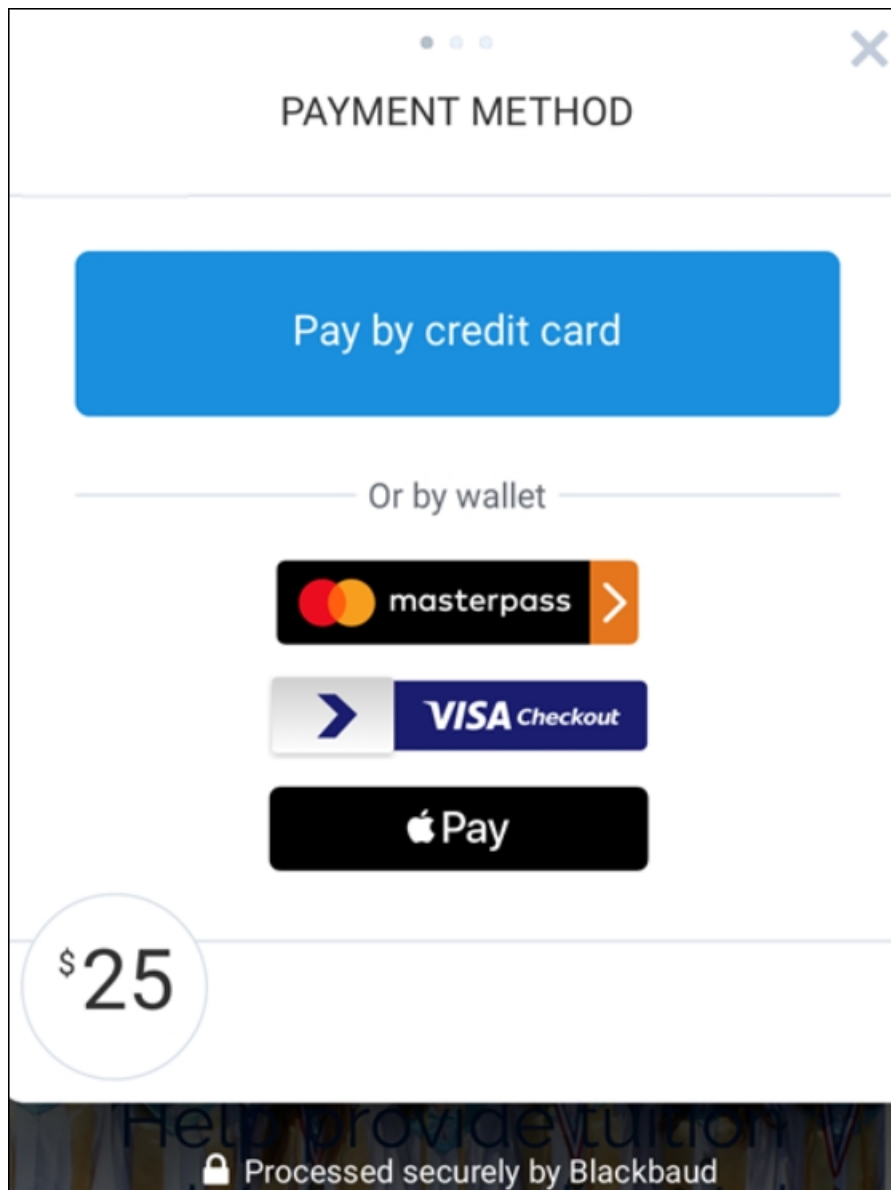
Previously, all emails which included the constituent's email address as an intended recipient were shown without distinctions. With this release, an alert icon appears next to any email that couldn't be sent due to a spam complaint, a hard bounce, a previous hard bounce, or a soft bounce. This enables you to review which messages did not reach the intended recipient and the reason for the delivery error.

For information about bounced emails and best practices for emails, refer to [Blackbaud's Email Resource Center](#).

The alert appears for email errors regardless of whether the email was generated from Blackbaud Internet Solutions or **Blackbaud CRM**.

## Apple Pay for Blackbaud Checkout

Apple Pay is now available to donors as a secure checkout option for **Blackbaud Merchant Services** (BBMS) customers in the U.S. Previously, this method of payment was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.



The screenshot shows a mobile checkout interface titled "PAYMENT METHOD". At the top, there are three dots and a close button (X). The main section has a large blue button labeled "Pay by credit card". Below this, a horizontal line separates the section, followed by the text "Or by wallet". Underneath, there are three payment options: a "masterpass" button with the logo and a right arrow, a "VISA Checkout" button with the logo and a right arrow, and an "Apple Pay" button with the Apple logo. At the bottom left, there is a circular badge containing the text "\$25". At the very bottom, there is a dark banner with a lock icon and the text "Processed securely by Blackbaud".

With the Donation Form - Mini part, you can now accept payments through Apple Pay when you use **Blackbaud Merchant Services** (BBMS) to process one-time credit card donations. This new payment option enables your constituents on Apple devices to make donations without having to enter as much

information on the donation form, because data such as their credit card number and billing address are already stored in their Apple Pay wallet.

**Note:** Refer to Apple's Terms and Conditions in the [Blackbaud Checkout FAQs](#).

## Additional Blackbaud Checkout Enhancements

This release expands enhancements that were introduced in service pack 19.

### Customize Page Theme

Previously, we announced that organizations can customize the theme on the Blackbaud Checkout page. This benefits administrators of organizations with branding guidelines who want to change the font and colors on the Blackbaud Checkout page to match your organization's brand. You can also specify a theme to use site-wide and override the site-wide theme on individual forms. For more information refer to [Blackbaud Checkout Enhancements on page 287](#).

With this release, the **Use site defaults for Blackbaud Checkout Theme** option now appears whenever you edit

- an Event Registration part
- Mini Donation Form (see [Service Pack 19 enhancements to the Donation Form - Mini Part](#))
- an Advanced Donation Form
- a Payment 2.0 part

and select a merchant account that supports Blackbaud Checkout. The option is selected by default, but you can override it.

If you don't want to use the default theme, clear the **Use site defaults for Blackbaud Checkout theme** option. Then enter values for the **Primary color** and **Secondary color** and select a different font.

### Checkout Page — Separate First Name and Last Name Fields

Likewise, when you edit event registration forms, advanced donation forms, or any Blackbaud Internet Solutions page using Payment 2.0, Blackbaud Internet Solutions now uses separate **First Name** and **Last Name** fields. Previously, these forms used a single Cardholder Name field for Blackbaud Checkout.

### Checkout Page — Customize Page Theme and Digital Wallets

Additionally, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout, MasterPass, or Apple Pay— are accepted during checkout for event registration forms, advanced donation forms, or any Blackbaud Internet Solutions page using Payment 2.0. By default, all payment methods are selected.

**Note:** Digital wallets are only available for **Blackbaud Merchant Services** customers.

# Service Pack 21

These features were introduced in Service Pack 21 after the original **CRM 4.0** release.

## Contact Job Title in AddressFinder

In order to follow our AddressFinder vendor's requirements, we must provide the job title of the user who submits an AddressFinder job process. To satisfy this requirement, we have made some changes to the **Title** field in the Add AddressFinder process screen. The field is now renamed to **Contact job title**. Previously, this field was a drop-down. With this change, we have updated it to be a text field. When you complete the form, enter your job title in this field, such as Gift Officer, Director of Development, etc.

The screenshot shows the 'Add AddressFinder process' dialog box. The 'General' tab is selected. The 'Contact job title' field is highlighted with a red arrow. The form includes the following fields:

- Name: [Text field]
- Description: [Text area]
- Site: [Dropdown menu showing 'All Sites']
- Primary contact:
  - Contact job title: [Text field, highlighted with a red arrow]
  - Name: [Text field]
  - Email address: [Text field]
  - Phone number: [Text field]
- Alternate contact:
  - Name: [Text field]
  - Email address: [Text field]
  - Phone number: [Text field]

Note: Please click 'Check file availability' on the process status page to determine if the updated information is available for retrieval.

Buttons: [Help], [Save], [Cancel]

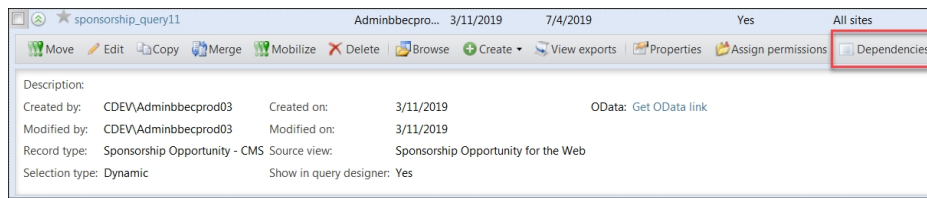
In addition, our vendor requires you to review and accept the information each time you submit an AddressFinder job. To meet this requirement, before you submit your file, you now see the Edit AddressFinder process screen so you can confirm that the information is correct.

To access AddressFinder processes, under **Administration**, select **Data tune-up** under **Tools**.

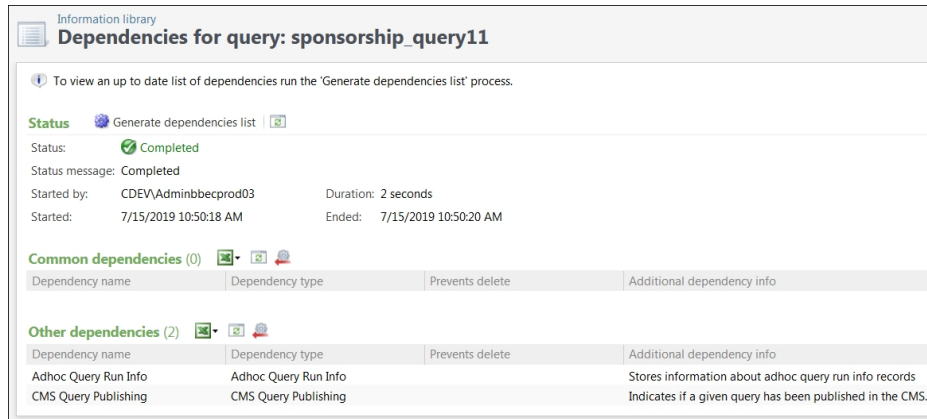
## View Ad-Hoc Query Dependencies

When an ad-hoc query is in use in the database, you cannot delete that query from the information library. To help you better understand how queries are being used, admins can now access a list of query dependencies for ad-hoc queries.

From **Analysis, Information library**, expand the query you want to review and select **Dependencies**.



To view the dependencies for the query, select **Generate dependencies list** under **Status**. Any dependencies for the query appear under **Common dependencies** and **Other dependencies**.



You can drill into any of the queries under **Common dependencies** and review the query in detail. Common dependencies include the following types of dependencies:

- Exports
- Other ad-hoc queries
- Smart queries
- Smart fields

Under **Other dependencies**, you see any other places where the query is being used. You are not able to drill into each query from this list.

## Clear Matching Gifts with Partial Payments

To help you maintain accurate records of matching gift claims, you can now clear any matching gift claims that have partial payments and that you do not expect to receive full payment for. Previously, you could only clear matching gift claims that had no payments applied. When you did, the matching gift claimed was marked as "Inactive." With this change, you can clear partially paid claims and they are marked with the new status of "Inactive (Partially paid)."

The Matching Gift Claim Summary report has been updated to include the new "Inactive (Partially paid)" status. Claims with this status appear on the report with a zero balance. Claims with a status of "Inactive" continue to be excluded from the report.

## Fundraising On the Go

To help you customize Fundraising On the Go (FROG) to better meet your needs, the mobile application is now available in open source. You can find the file repository on [GitHub](#). For technical development documentation, including how to get started and code samples, see the [Developer Guide](#).

## Sign in using LinkedIn OAuth2

**Blackbaud Internet Solutions** users can set up a sign in using the social media network *LinkedIn* with *OAuth2*. If you already use *LinkedIn* with *OAuth1*, you can upgrade to use *OAuth2* instead.

For instructions, see the [Social Sign In for LinkedIn with OAuth2 guide](#) from the [how-to documentation on \*www.blackbaud.com\*](#).

## Blackbaud Checkout Enhancements

This release expands enhancements that were introduced in Service Packs 19 and 20 for **Blackbaud Internet Solutions**.

### Forms

With Service Pack 21, these additional forms now also use **Blackbaud Checkout**.

- Event Registration Forms - Classic
- Donation Forms - Classic
- Transaction Manager

### Digital Wallets

For all **Blackbaud Internet Solutions** forms that use **Blackbaud Checkout**, the payment options that appear under **Digital Wallets** will no longer appear in the editor. Previously, organizations could disable selected payment methods (*Visa Checkout*, *MasterPass*, and *Apple Pay*) from the editor. Now, digital wallets will appear to the donor (end user) based on the configuration of the selected merchant account. If the merchant account is configured to show wallets, all options are shown. If the merchant account does not support wallets, none are shown to the end user as payment options.

Additionally wallets no longer appear for recurring transactions, regardless of the merchant account configuration.

**Note:** For more information, see the [Blackbaud Checkout FAQs](#).

## Email Forwarding is Deprecated

As of Service Pack 21 for **Blackbaud Internet Solutions**, the Email Forwarding part is now deprecated. When an admin creates a part, the email forwarding part no longer appears as an option. A message appears on existing parts to inform users that email forwarding is disabled.

Email forward service entries in `testconfig.aspx` and `configinfo.aspx` have also been removed.

## Security Improvements

To ensure we provide the latest security enhancements for **Blackbaud Internet Solutions**, we upgraded *jQuery* to version 3.4.1. We recommend that all clients upgrade Service Pack 21 to ensure they take advantage of the latest security enhancements.

This release also includes additional security enhancements.

## Janrain is now Akamai

*Akamai Technologies* recently acquired *Janrain* and renamed their *customer identity and access management (CIAM)* product to *Akamai Identity Cloud*.

Integration with this third-party authentication service enables your organization to manage multiple logins for your **Blackbaud Internet Solutions** website and social network websites, such as *Facebook* and *Twitter*.

Existing *Janrain* integrations require no updates: the functionality and configuration for this integration has not changed. You'll simply notice the rebrand and updated website information for the company. Your original *Janrain* dashboard remains at <https://dashboard.janrain.com/>.

We're updating our help documentation to reflect the rebrand to *Akamai*. However, some documentation may continue to use the legacy name, *Janrain*.

To set up this integration, follow the directions in our documentation for *Janrain* or *Akamai*.

## Service Pack 22

These features were introduced in Service Pack 22 after the original **CRM 4.0** release.

## Award Management

With **Award Management**, you can keep track of student awards. **Award Management** now has a one-way integration with **Blackbaud CRM**, so you can see student awards that have been granted and accepted for constituents in your **Blackbaud CRM** database.

## Configure Award Management Integration

Before you can integrate **Award Management** with **Blackbaud CRM**, you must configure the connection between the two programs.

1. From *Administration*, select **Award Management configuration** under **Award Management**. The Award Management Configuration page appears.
2. Select **Edit configuration**. The Edit an Award Management configuration screen appears.
3. In the **Award Management** token field, enter your token. To find your token in your **Award Management** admin portal, select **Site, Settings, Import & Export Tools**. The token appears under **Export Token**.
4. In the **Award Management URL** field, enter the URL you use to access your **Award Management** website.
5. Select **Save**. You return to the Award Management Configuration page.

## Add Award Management Integration

Once you configure your integration, you can add a business process to run regularly to update your **Award Management** information in your **Blackbaud CRM** database. You can run the process manually or schedule it to run periodically to keep your database up to date. The **Award Management** information appears on the constituent record, under **Funds received**.

**Note:** The integration updates **Award Management** information in your database, but it does not add new constituent or award records.

1. From *Administration*, select **Award Management integration** under **Award Management**. The Award Management Integration page appears.
2. Select **Add**. The Add an Award Management integration process screen appears.
3. Enter a name and description for the process. These will help you and others recognize each business process, particularly if you create more than one.
4. In the **Integration type** field, select the data you want to transfer from **Award Management** to **Blackbaud CRM**.
  - When you select **Full**, the integration process loads all the available Award Management information into Blackbaud CRM. This works best the first time you run this process.
  - When you select **Incremental**, the integration process only updates information that has changed in **Award Management** since the last time you ran the process.

**Note:** You can create two processes, one for full integration and one for incremental, or create a single process, run a full integration once, and then edit the process to be incremental for subsequent runs.

5. Select **Save**.

**Tip:** Once you create your integration process, you can run it or schedule it to run periodically.



## Adobe Flash: Notice of Depreciation

By the end of 2020, *Adobe Flash* will not longer be supported or updated by *Adobe*. For more information and links to posts from all browser vendors, refer to the official announcement on *Adobe's* blog at [Flash & The Future of Interactive Content](#).

As of Service Pack 22, **Blackbaud Internet Solutions** has deprecated the **Flash Player** part, and removed it from the list of available part types. No new instances of this part type can be created. Existing pages which use the **Flash Player** part will show a yellow banner indicating that the part has been deprecated.

*Blackbaud* encourages clients to review current industry best practices and standards, particularly HTML5 and refresh/redesign pages currently using **Flash Player** accordingly.

## Increased Cap for Event Registrants

Previously, the **Events 2.0** part for **Blackbaud Internet Solutions** limited total registrants to 50 registrants. This maximum was cumulative for multi-level events; registrants at sub events were counted towards the maximum.

Now, the maximum number of total registrants is limited to 500. Additionally, the maximum is no longer cumulative for multi-level events; the maximum applies to each sub event separately.

## Blackbaud Checkout

In **Blackbaud Internet Solutions**, the **Direct to payment** section of **Donation** forms and **Event (Classic)** forms now include a checkbox option for **Checkout**.

- Select this option to use a **Blackbaud Secure Payments** page whenever **Blackbaud Checkout** is not supported by your selected merchant account.
- If you do not select this new option, the form will continue to behave as it did prior to this service pack.

## Service Pack 23

These features were introduced in Service Pack 23 after the original **CRM 4.0** release.

## Integration with Financial Edge NXT

Hosted clients in the United States can now integrate **Blackbaud CRM** with **Financial Edge NXT**.

If your organization already uses **Financial Edge NXT**, you can integrate it with **Blackbaud CRM**. This integration allows the two systems to be synchronized for fiscal years, accounts, and projects. It also

increases efficiency by allowing users to post gifts directly from **Blackbaud CRM** into an open journal entry batch in **Financial Edge NXT**. When you synchronize funds from **Financial Edge NXT** to designations in **Blackbaud CRM**, you are also able to see financial data from **Financial Edge NXT** from that designation record.

For more information, see the [General Ledger Setup Guide](#).

# Matchfinder Online Service

We streamlined how we deliver *Matchfinder Online* to align it with how we deliver other optional modules. To take advantage of this change, you must unlock the module by selecting **Unlock Optional Modules** under the **Welcome** menu. Previously, you activated the integration under **Revenue**.

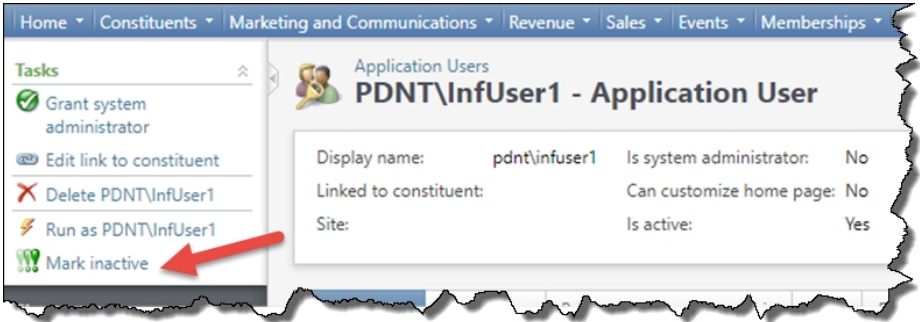
# Service Pack 24

These features were introduced in Service Pack 24 after the original **CRM 4.0** release.

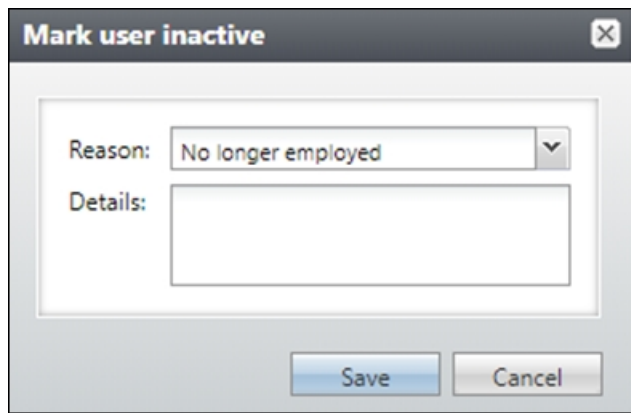
# Inactivate Users

You can now mark users as inactive in **Blackbaud CRM**.

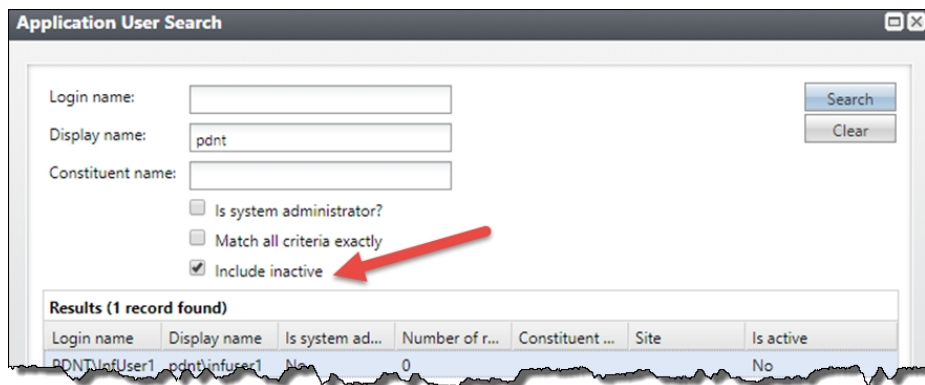
You can mark a user as inactive from the **Application Users** list or from the user's record under **Tasks**.



When you select this option, you must enter a reason code and can add optional details. Reason codes can be added on this screen and managed under **Administration, Code tables, Application User**.



When you search for a user, you can now also filter by inactive users.



Inactive users cannot access the system but can be reactivated at any time. Business processes and queries created by the user before they were inactivated can still be run by other users.

## Service Pack 25

These features were introduced in Service Pack 25 after the original **CRM 4.0** release.

## R68 Gift Aid Report

We have made changes to how the R68 Gift Aid report is calculated. Previously, the data in the report was updated dynamically, which could cause details to be inconsistent over time. With this fix, the information in the report provides a static snapshot of the data so there are no discrepancies.

## Site Security on Data Lists

When an admin creates a data list from a query, they can now enforce site security for the data list.

This functionality is controlled using a new setting in the web.config file. To take advantage of this change, you must set the "RECORDSECURITY\_ENABLED" setting and the new web.config setting "RECORDSECURITY\_ENABLED\_FOR\_CUSTOMDATA LIST" to true.

**Note:** Existing data lists are not affected by this change. To enforce site security on existing data lists, you must resave them.

## Payment Workflow Repair

We have implemented a Business Process called "CMS Repair Checkout Transaction Business Process" which repairs transactions that have been authorized but were not immediately downloaded when using **Blackbaud Checkout** with Donation Forms, eCards, Mini Donation Forms and Advanced Donation Forms. This process runs every 15 minutes to make the repair and perform all post transaction completion activities, such as Acknowledgements, eReceipts, Honeycomb updates, and Notifications.

## Service Pack 26

These features were introduced in Service Pack 26 after the original **CRM 4.0** release.

## Copy user role from one user to another

To help you more easily assign system roles to new users, admins can now copy roles from an existing user to another. This can be helpful for example if you are adding a new user and you know you want them to have the same permissions as an existing user. It can also be used to standardize permissions across teams or groups of users.

To copy permissions from one user to another, go to **Administration, Security, Application users**. If the new user is not already in the system, add them first. Then, select the user and then select **Copy application user roles** under **Tasks**. On the screen that appears, search for an existing user and then select Copy.

**Note:** Copying roles from one user to another overrides any existing roles that the target user already has assigned to them.

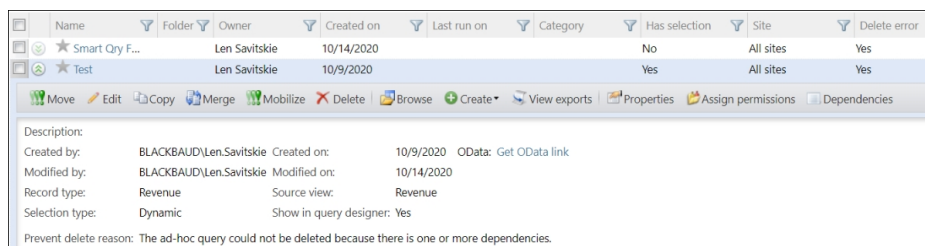
## Link Employer Relationship End Dates to Employment History End Date

To help you maintain accurate data, when you add an end date to an employee-employer relationship, now the same end date is automatically added to the related **Employment History**. This change does not affect changes made through batches.

## Delete Multiple Queries

You can now delete multiple queries in one step. From the list of queries, select the queries you want to delete by selecting the icon to the left of the query name, or select the top icon to select all the queries on that page and then select **Delete**.

With this change, errors when attempting to delete queries display differently. Previously, you received an error if you attempted to delete a query that was in use. Now, when you attempt to delete multiple queries, some might be in use and some might not. If any of the queries are in use and cannot be deleted, a **Prevent delete reason** error appears on the query's details. To make it easier to determine which queries have errors, we have added the **Delete error** column to the query list. This column does not appear by default, but we recommend that you add it to your query list.



Name	Folder	Owner	Created on	Last run on	Category	Has selection	Site	Delete error
★ Smart Qry F...		Len Savitskie	10/14/2020			No	All sites	Yes
★ Test		Len Savitskie	10/9/2020			Yes	All sites	Yes

Move Edit Copy Merge Mobilize Delete Browse Create View exports Properties Assign permissions Dependencies

Description:  
 Created by: BLACKBAUD\Len.Savitskie Created on: 10/9/2020 OData: Get OData link  
 Modified by: BLACKBAUD\Len.Savitskie Modified on: 10/14/2020  
 Record type: Revenue Source view: Revenue  
 Selection type: Dynamic Show in query designer: Yes  
 Prevent delete reason: The ad-hoc query could not be deleted because there is one or more dependencies.

## Payment Workflow Repair

In Service Pack 26 we implemented a Business Process called CMSRepairCheckoutTransactionBusinessProcess which repairs transactions that have been authorized but were not immediately downloaded when using **Blackbaud Checkout**. We have extended this process to include both **Event Registration** parts.

## Service Pack 28

These features were introduced in Service Pack 28 after the original **CRM 4.0** release.

## Edit Membership Type

After we deprecated the Membership Details Edit form in Service Pack 16, you could no longer edit membership types.

Now, you can edit a membership type using the new **Edit Membership Type** option under **Other tasks** on a membership program record.

The screenshot shows a CRM interface for a member profile. On the left, a box displays 'level1', '\$120.00', and 'Active'. To the right, fields show 'Members Constituent', 'Lookup ID 8-10007522', 'Lifetime member', 'Balance: \$0.00', 'Paid in full as of: 4/6/2021', and 'Total payments made: 1'. A red arrow points to a dropdown menu labeled 'Other tasks\*' which includes options: 'Delete membership', 'Cancel membership', 'Edit membership ID', and 'Edit membership type'. At the bottom, there are tabs for 'Primary member', 'Additional details', and 'Lifetime information'.

## Synchronize Employment History with Employment Relationship Dates

You can now select to sync employment history with employment relationship dates automatically.

When you add or edit employment information for a constituent, or add or edit a relationship between an individual and an organization, you can choose to automatically synchronize end dates. To do this, select the new "Sync end date with organization relationship" option when you add or edit an end date on an employment history for a constituent.

The screenshot shows a dialog box titled 'Edit employment information'. It contains the following fields and options:
 

- Job title:** A1
- Career level:** Executive (dropdown)
- Category:** (dropdown)
- Start date:** 1/03/2021 (calendar icon)
- End date:** 9/04/2021 (calendar icon)
- ☒ Sync end date with organization relationship
- Department:** (text field)
- Division:** (text field)
- Schedule:** (dropdown)
- Responsibilities:** (text area)

 At the bottom, there is a 'Help' button with a question mark icon, and 'Save' and 'Cancel' buttons.

You can also select the new "Sync end date with employment history" option when you add or edit an end date on a relationship between an individual and an organization.

**Note:** The dates only synchronize with the latest employment information. Historical employment information is not synchronized.

## Service Pack 29

These features were introduced in Service Pack 29 after the original **CRM 4.0** release.

## Single Sign-On

To simplify and improve your Blackbaud log-in experience, we streamlined our system so you can use one set of credentials to access all Blackbaud resources. With the new Blackbaud

Omnibar and single sign-on features, you can log in to **Blackbaud CRM**, blackbaud.com, and other Blackbaud programs using the same username and password. For example, if you

use **Blackbaud CRM** and **Financial Edge NXT**, when you log in to **Blackbaud CRM** with your Blackbaud single sign-on account, you are logged in to **Financial Edge NXT**

automatically and you can easily navigate between the two programs in the same window.

**Note:** If you are hosted, your organization will be notified before being upgraded to the Blackbaud Omnibar with

single sign-on support.

For more information, see the Administration Guide.

# Password Reset

To improve security, we have made the following enhancements to email address and password management for **Blackbaud Internet Solutions**.

- When you need to reset your password, you now enter the old and new passwords in the same screen rather than separate screens.
- When you change your email address, you now receive an email to your old email address notifying you of the change.
- Admins can configure how long passwords will last before they expire in the web.config file, under the setting "PasswordExpirationDays."

The expiration time must be between 90 and 365 days.

# Multi-Factor Authentication

To improve security, we have implemented multi-factor authentication (MFA) for **Blackbaud Internet Solutions**. Under **Sites & Settings, Settings**, you can now see the new Multi-Factor Authentication Setup section.

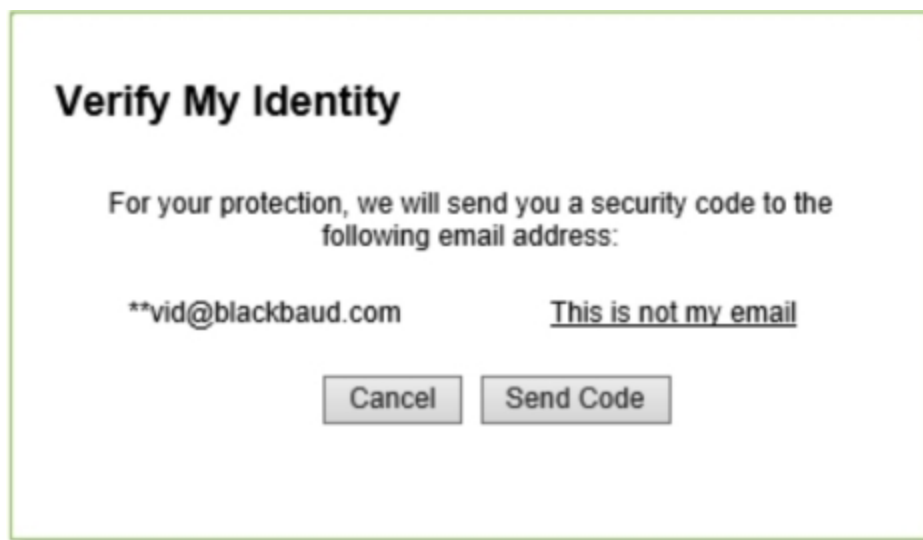
The screenshot shows the 'Settings' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'MultiFactor Authentication Setup'. The first option is 'Enable MFA', which is checked. To the right of this option is a tooltip that says 'Selecting this option will enable MFA for all your parts which provide login capabilities.' Below this, there are two sections: 'MFA Code Email Setup' and 'Email Address Change Email Setup'. Each section has a 'Setup' button. To the right of the 'Setup MFA Code Email' button is a tooltip that says 'Click this button to setup MFA Code Email'. To the right of the 'Setup Address Change Email' button is a tooltip that says 'Click this button to setup Email Address Change Email'.

There, you can enable MFA and set up emails to send the MFA code and address changes.

## Login Experience

When you log in, you now see a request to verify your identity. Select **Send Code** to receive a multifactor authentication code via email.

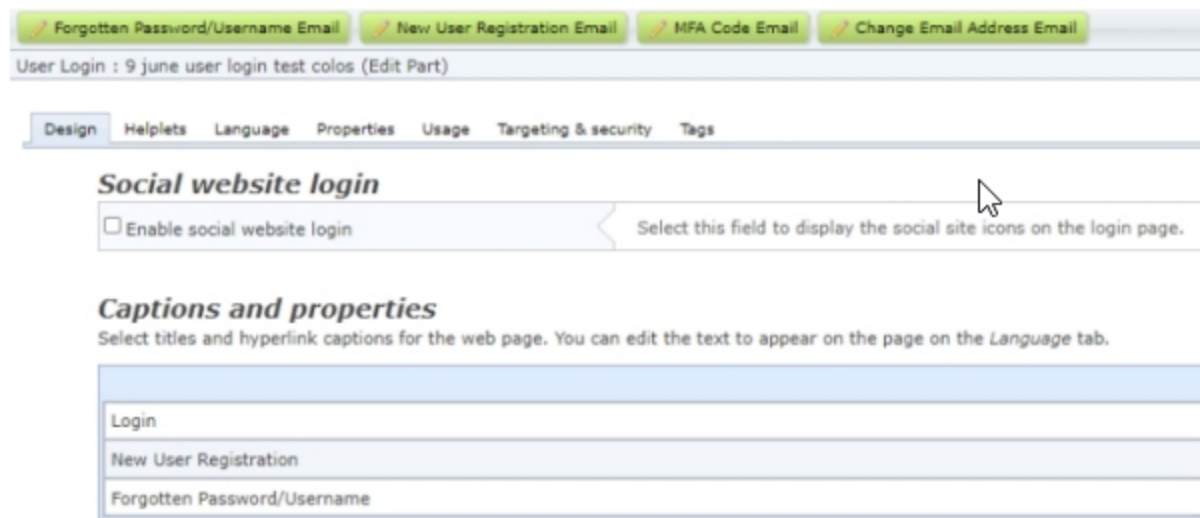




If you do not have an email address on file, you will be prompted to enter one.

### User Login Part

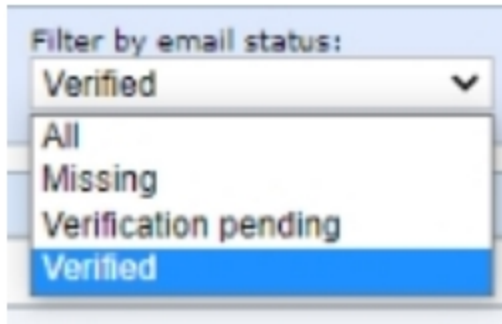
The User Login Part now includes a link to **MFA Code Email**, which allows you to access and edit the MFA code email template. You can also use the new **Change Email Address Email** option.



In addition, the Language tab on the User Login part includes a new category for "Multi-factor authentication." This allows you to customize verification popups and data entry validations.

### User List

We have also updated the user list to include a filter for Email Verification Status for each user.



## Configure Account Lockout Duration

Admins can now configure the account lockout duration to better manage how login attempts are handled. In **Sites and Settings**, under **Registration and login options**, you can see the lockout options. The number of attempts must be between one and five, and admins can adjust the lockout duration to any length of at least 10 minutes.

**Note:** Users can't access their account after a lockout (even after a password reset) until the lockout time period ends.

## eStore

eStore functionality has been deprecated.

## TinyMCE Upgrade

In a previous version, we upgraded TinyMCE to version 5.7.1 in Email Template, Email Messages, Layouts, Discussion Groups, and FTI. With this release, we have upgraded to version 5.7.1 for the rest of the application.

## Service Pack 30

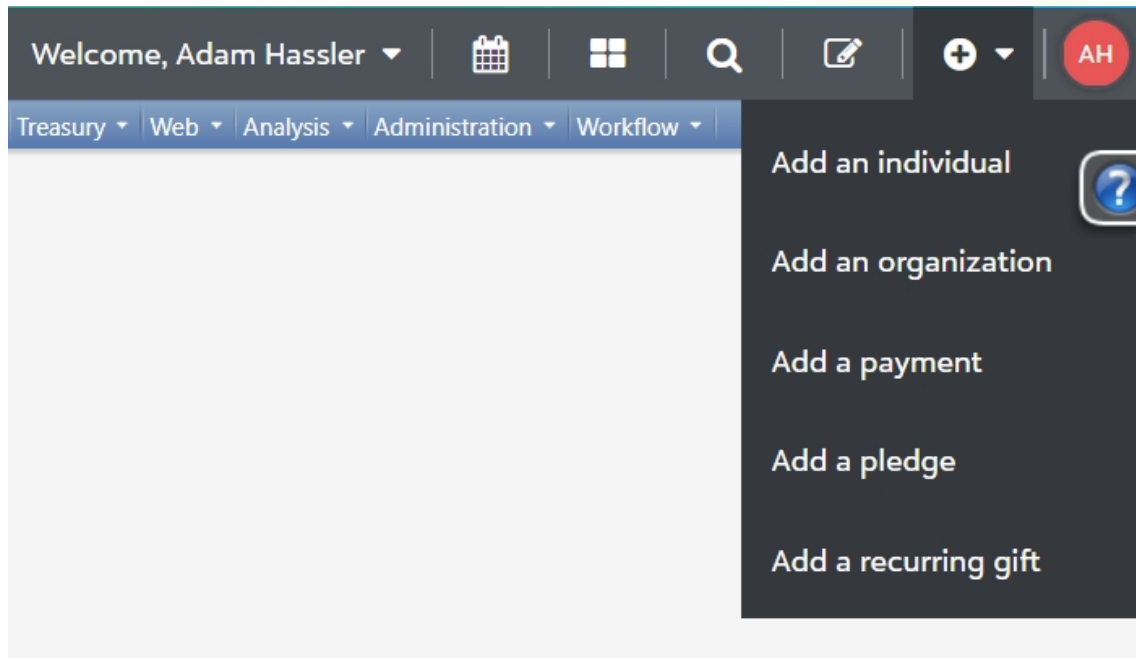
These features were introduced in Service Pack 30 after the original **CRM 4.0** release.

## Payment Workflow Repair

In Service Pack 25 we implemented a Business Process called **CMSRepairCheckoutTransactionBusinessProcess** which repairs transactions that have been authorized but were not immediately downloaded when using Blackbaud Checkout. We have extended this process to include the **Transaction Manager** and **Sponsorship Status** parts.

## "Add New" button added to Omnibar

The "Add New" button is now on the omnibar. Like the previous "Add New" button, you can use it to add a new individual, organization, payment, pledge or recurring gift.



## Global change to clear Business Process Status History

To improve performance issues, we added a new global change called **Business process status delete** to clean up the **Business Process Status** table. You can choose to either delete the business processes based on how old the runs are or delete all but the most recent runs.

Add global change

Type: Business process status delete

Name:

Site: 

All sites

Parameters

☒ All business processes

☐ Selected business processes

Selection:

Delete status

☒ generated by business process runs older than 

1

Year(s)

☐ for all but the most recent 

5

 runs

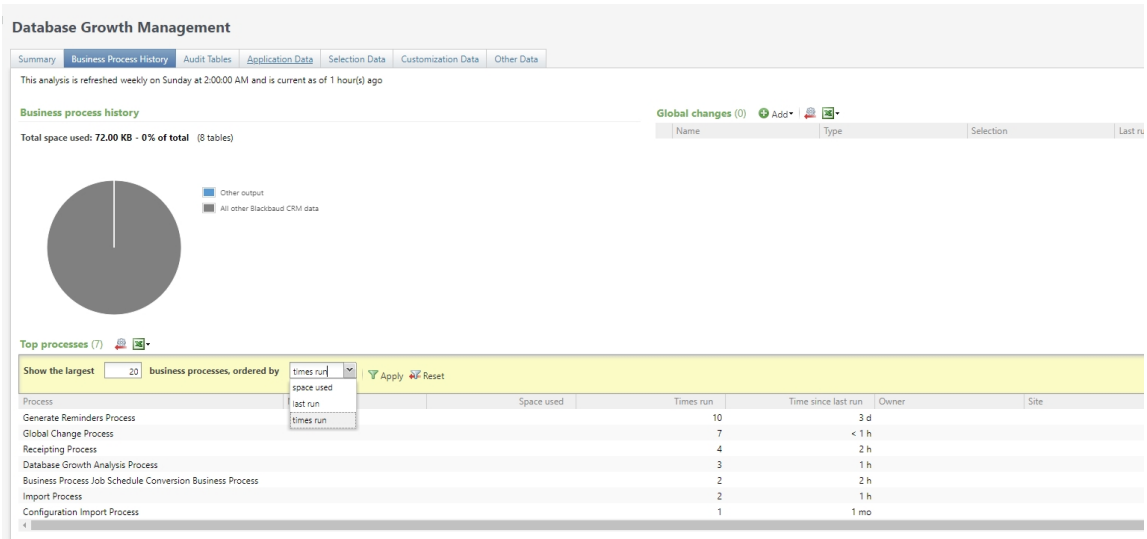
?

 Help

Save

Cancel

On the **Business Process History** tab under **Database Growth Management**, we added a new option in the **Top Processes** section. From the **ordered by** drop down, you can now select **times run**, which displays a list of business processes sorted by the most status history records. You can use this list to inform your decisions around which business processes need to be deleted to improve performance.



## jQuery Version Upgrade

With this release of **Blackbaud Internet Solutions**, we have upgraded the jQuery version from 3.3.1 to 3.6.0 and jQuery UI version to 1.13.0. If you use custom JavaScript on your **Blackbaud Internet Solutions** pages, we recommend additional testing to ensure this has not affected your user experience.

## Service Pack 31

These features were introduced in Service Pack 31 after the original **CRM 4.0** release.

## Payment Workflow Optimization with Payment 2.0

In previous Service Packs we implemented the CMS Repair Checkout Transaction Business Process, which reviews and resolves **Blackbaud Internet Solutions** transactions that have been authorized but were not immediately downloaded when using **Blackbaud Checkout**. With this release, we have extended this optimized process to include the Payment 2.0 part (shopping cart). The following parts utilize Payment 2.0: Donation Classic, Event Classic, Membership, Sponsorship, Advanced Donation Form, Transaction Manager, eCard and Sponsorship Status.

**Note:** For linked users, transactions that are eligible for repair by Business Process will be fixed when the user logs into their cart again before Business Process' scheduled run. In this case, no entry for Business Process' run will be maintained in the CRM Business Process history.

## Donation Classic Checkout with User Sign Up

We have re-enabled the capability to include User Sign Up functionality with Donation Classic via an `<appSettings>` key in the **Blackbaud Internet Solutions** web.config file as follows: `<add key="AllowAccountRegistration" value="true"/>`

**Note:** To allow User Sign Ups on this part, you are required to update your web.config file with the Appsetting indicated above.

## Blackbaud Secure Payments for eCards

To improve usability, we have implemented **Blackbaud Secure Payments** for eCards and Donations with the eCard option enabled. The print eCard option is now available as well.

☒ Use Secure Payment page

Select this checkbox to use Blackbaud secure payment page when Blackbaud Checkout is not supported by your Merchant Account. [Learn more about secure payment pages.](#)

## FTP Configuration Removal

The FTP (File Transfer Protocol) configuration has been removed from Data Tune-Up settings.

**Edit data tune-up settings**

**Address formatting**

☒ Delivery address line and secondary address information on the same line  
 John Smith  
 102 Main St Apt 101  
 Anytown, USA 10101

☐ Secondary address information on the line immediately above the delivery address  
 John Smith  
 Apt 101  
 102 Main St  
 Anytown, USA 10101

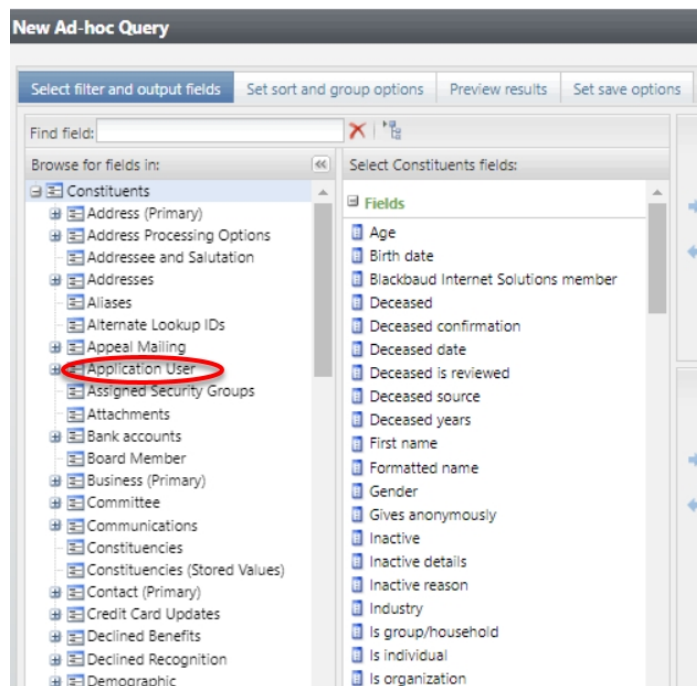
☐ Secondary address information on the line immediately below the delivery address  
 John Smith  
 102 Main St  
 Apt 101  
 Anytown, USA 10101

☒ Do not abbreviate address elements according to USPS format  
☐ Capitalize the entire address

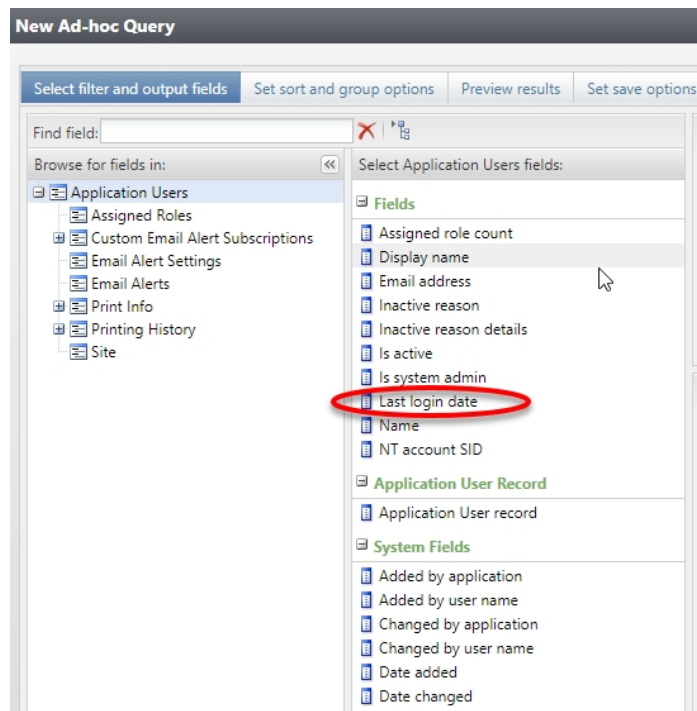
? Help
 Save
 Cancel

## Application User Query Updates

An Application User node has been added to the constituent query view. With this new node, you can now pull queries of **Blackbaud CRM** users that meet certain criteria such as being in a particular department.



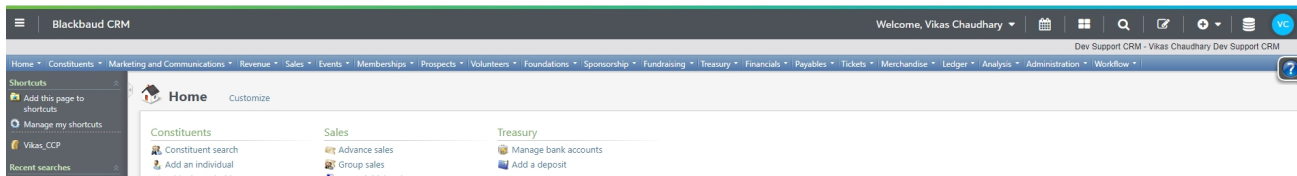
A Last login date has been added to the Application User node.



# Environment Name Added to Omnibar

To improve usability, the Omnibar now displays the name of the product environment being used. Below the Omnibar, there is a small strip showing the name of the current environment that is colored gray while in production and yellow while it is not in production. For your users that log in to more than one of your environments, this will help to remind them which environment they are currently using.

Image of the strip in a **Blackbaud CRM** environment:



# Custom Branding for Blackbaud ID

If you have enabled **Blackbaud ID** for **Blackbaud CRM**, you may now add custom branding for your **Blackbaud ID** login screen. You will find this as part of your Org Admin portal for **Blackbaud ID**.

For more information on how to set up custom branding, see [Blackbaud ID branding online help](#).

# Password Reset Functionality

With this release, **Blackbaud Internet Solutions** has enhanced and secured how users and passwords are managed by User Administrators in Phase II.







- We have renamed the Sites & Settings > MFA tab to Authentication and updated the section layout to improve clarity.
- Within Users & Security, we have replaced the ability for an administrator to set or change a user password with providing user administrators the ability to send users a Password Reset Email to allow them to self-service.
- We have updated the User Login part New User Registration Email template to be used by Site Administrators for new User management tasks (If not configured, the default Site Login page will be used).

## User Editor





- We have removed the Change Password and Confirm Change fields for each user account.
- When a new user is created by an Administrator via Users & Security>Users>New user, a New User Registration Email is automatically sent when the Save button is clicked.




- When a user has requested a password reset an organization user administrator will send out an Email containing a link to the Password Reset page. A confirmation pop-up will display prior to the send.
- The Administrator can either open the user and choose the Send Password Reset Link button or choose the icon on the User List on the Action column next to the user.
- If the User does not have an Email address neither the icon nor the button will be visible.

Action	First name	Last name	Username	Email address
  	Humphrey	Bogart	Humphrey.Bogart	bogey@blackbaud
  	Nikki	Cameron	Nikki Cameron	NitishGupta.runm

**Nikki Cameron (User editor)**

 Save
  New user
  Delete
  Return

User editor Messages

 This user is not linked to a constituent record in Blackbaud CRM.

☐ This user has Supervisor rights and can manage Users and Roles.

Login Name: \*


Nikki Cameron

**Send Password Reset Link**

Email Address: \*




nicola.cameron@blackbaud.com

Time Zone:




- The Users page has been enhanced to include both a column and a filter for Email address.




**Users**

 New user  View tutorial  Help

Use this screen to add user accounts *only* for users who have administrator roles. You can also edit and delete user accounts, and assign users to roles.

Filter by first name: 
 Filter by last name: 
 Filter by login: 
 Filter by Email: bogey@blackbaud.com
 Filter by role: Everyone
 Filter by back office link: 
☐ Deleted

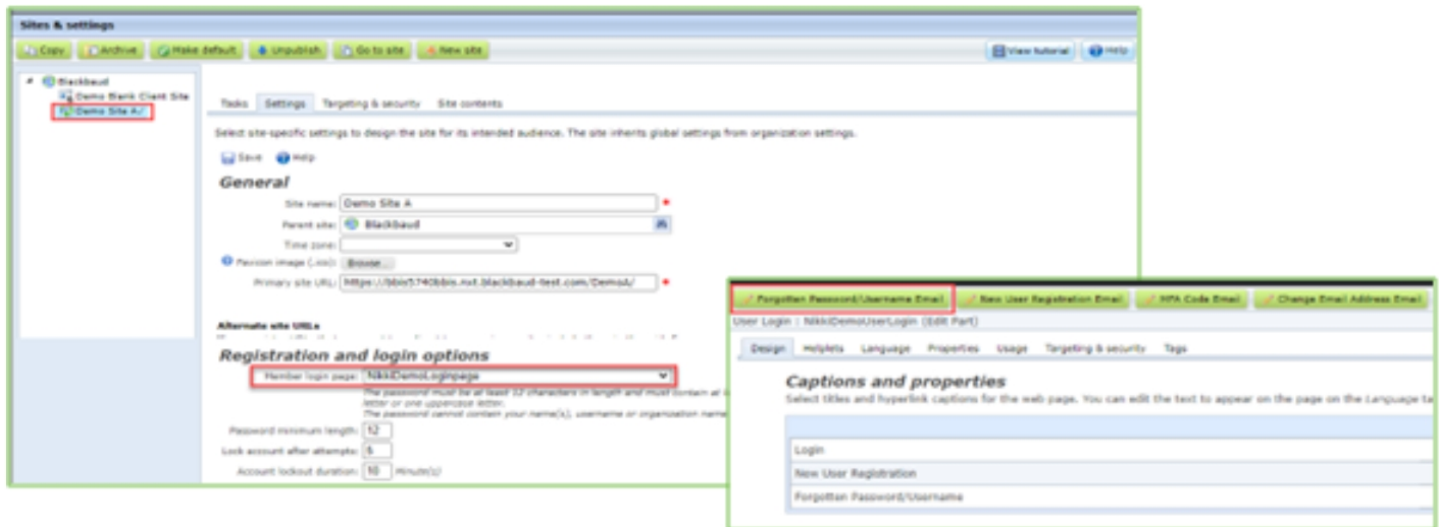
☐ Supervisor 

Action	First name	Last name	Username	Email address	Last login
  	Humphrey	Bogart	Humphrey.Bogart	bogey@blackbaud.com	

1 user meets selected criteria

## Email Templates

- **Password Reset Link Template** - In order to maintain branding for multiple sites, the email templates used for the Password Reset will be those associated with the User Login part - Forgotten Password/Username Email template which has been configured for each Site in the Registration and login options>Member login page section.



- If no page is configured in Registration and login options as a Member login page for the selected site, then the default site login configuration User login page and Forgotten Password/Username Email template will be used.
- In Administration areas, the current logged in site or site chosen from the site menu will be used.
- If there is no default site, or the default site does not have a login page configured, the non-configurable email template content stored in the database that is used with the Login.aspx page will be used.

**New User Registration Email Template** - To support multiple usage, we have implemented a conditional merge field section on the User Login part New User Registration Email template that will only be used when a user is manually added by an Administrator and separated out another conditional section that is used when a user self-registers on a site. This provides more flexibility on verbiage for each registration scenario.

User Login : NikkiDemoUserLogin (New User Registration Email)

Name of email: Welcome new registration (NikkiDemoUserLog)\*

Subject: New user registration request\*

From address: nicola.cameron@blackbaud.com\* From name: System Administrator\*

Reply address:

Notifications Failures: ☐

Insert View Table

↩ ↪ ✂ 📄 📧

Welcome to Our Online C

Thank you, {First Name}, for

Username: {User Name}

**Merge Fields**

- User Fields
  - First Name
  - Last Name
  - Username
  - Password Reset Link
  - Time Zone
- Password Reset Link Fields
  - Self Registration Password Reset Link
    - Self Register Begin Section
    - Password Reset Link
    - Self Register End Section
- User Administration Password Reset Link
  - User Admin Begin Section
  - Password Reset Link
  - User Admin End Section

**Note:** For **Blackbaud Internet Solutions**, existing Password reset merge fields will be retained to maintain the backward compatibility for existing templates, however, after upgrading to Service Pack 31 to avoid multiple password reset links in the email confusing users, User Administrators need to edit their New User Registration Email templates to include the password reset link conditional merge fields.

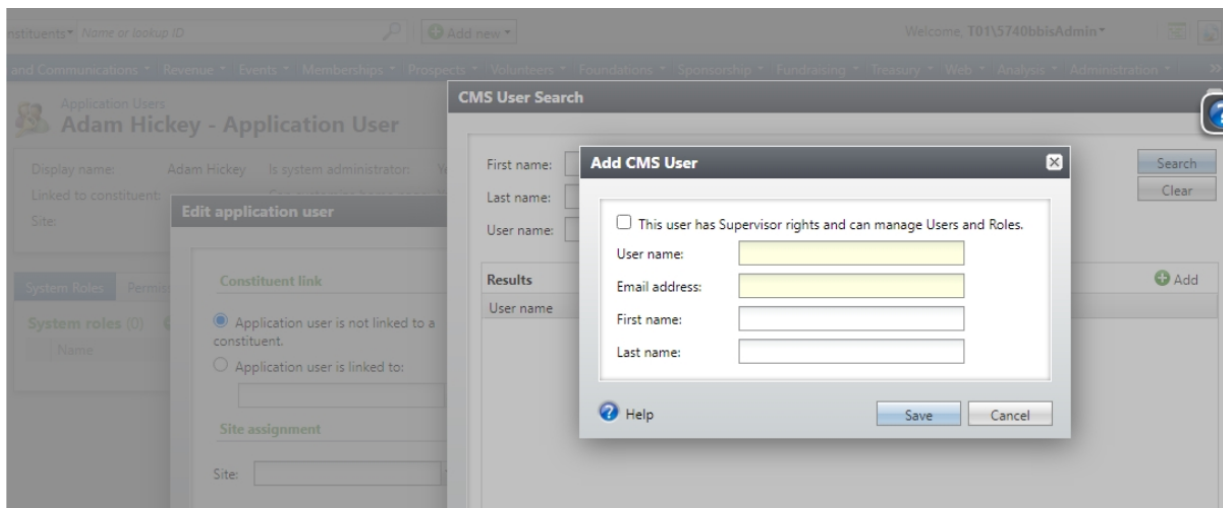
**Note:** Login pages are only considered as configured where the Forgotten Password/Username Email template and New User Registration Email templates include a password reset link.

## Login.aspx

When a user has attempted to log in via Login.aspx, they have the ability to self-service their password reset by entering their account linked email address to which a Password Reset email will be sent. Refer to the Password Reset Link Template section above for more information on which Email Template will be used.

## CMS User in CRM

- We have removed password fields from the Add CMS User form that enables CRM Application Users to be linked with **Blackbaud Internet Solutions** users.
- The New User Registration email is automatically sent on save which directs the user to self-service their password reset.
- This email template is the one configured on the Default Site User Login part unless it contains no Password Reset link, in which case the non-configurable Login.aspx email template will be used.



## RecordNewUserHandler

No changes impacting the use of this handler will be included in Service Pack 31. This means that clients using Single Sign-on (SSO) will not experience any change in workflow.

## Service Pack 32

These features were introduced in Service Pack 32 after the original **CRM 4.0** release.

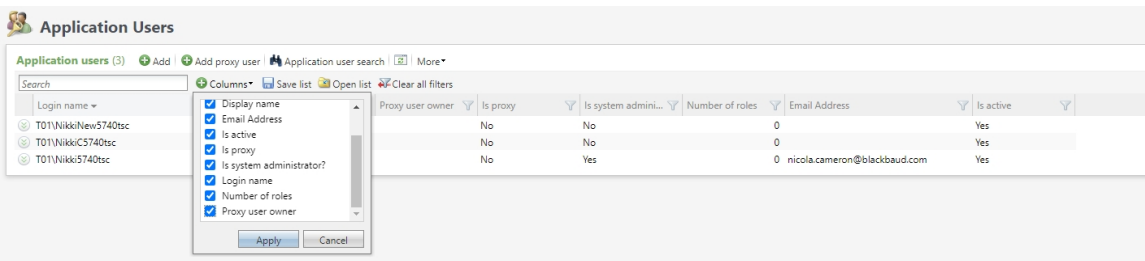
## Proxy User Management

To provide additional security and easier permission management for automated logins, such as for integrations, you can now create proxy users. A proxy user or NIU (non-interactive user) is a copy of an application user that inherits the application user's system roles and permissions but authenticates with a PAT (Personal Access Token).

**Note:** Only application users with appropriate system permissions can create proxy users and assign personal access tokens.

**Note:** BBJobUser, Report User that handles communication on the SQL side between **Blackbaud CRM** and Reporting services, BBNCAppPoolUser and OLAP user remain as Windows users.

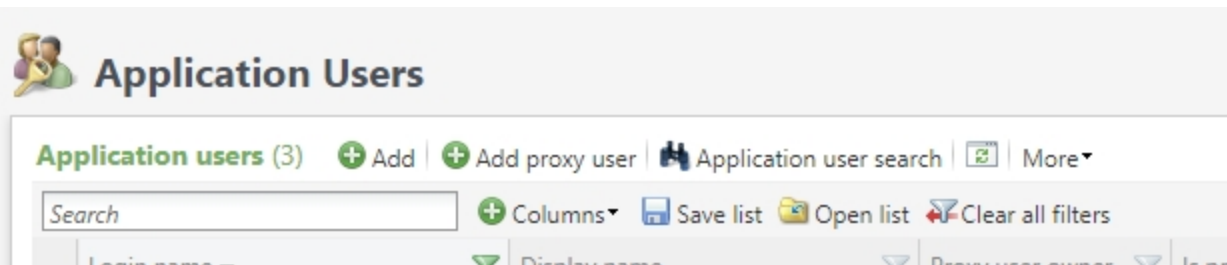
The **Application User Page** has two additional columns, **Is proxy** and **Proxy user owner** which are available whether **Blackbaud ID** is on or off. Neither of the columns are displayed by default but can be selected for inclusion in the **Application Users data list** via the **Columns selector**.



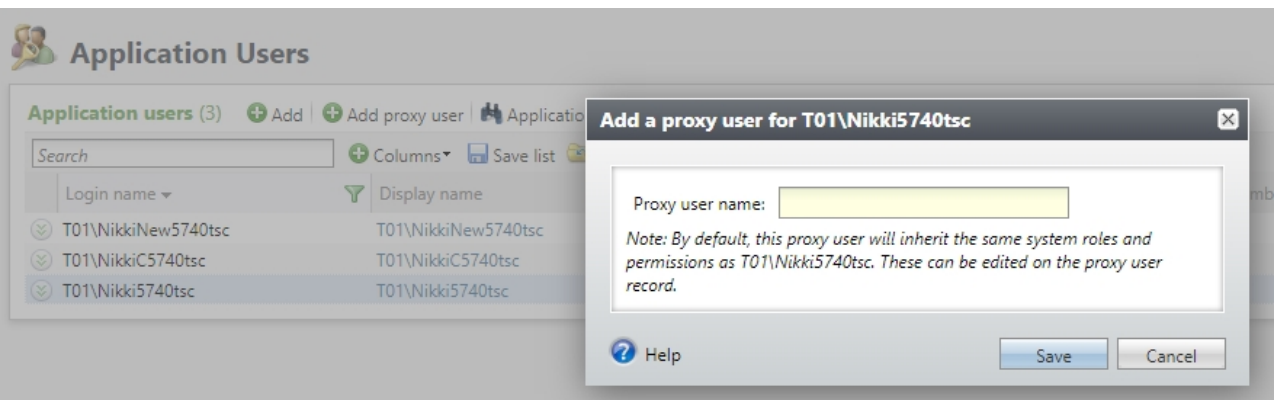
**Note:** The above image shows an environment with **Blackbaud ID** turned off. When **Blackbaud ID** is turned on the columns are added and display in the same way.

### Add a Proxy User

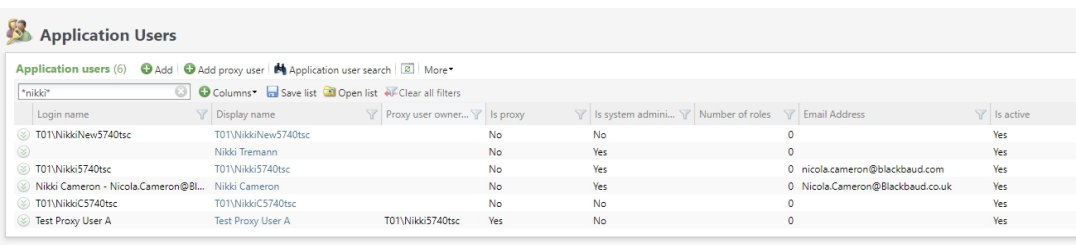
You can add and maintain proxy users via the existing **Application Users** page.



**Blackbaud CRM** users with the necessary permissions can add, edit, and delete proxy users, as well as manage personal access tokens.



Unique proxy user names can be viewed in the **Application User** data list as the **Login name** (relabelled as Domain name in a **Blackbaud ID** environment) and is the same as their unique username which is used for authentication. When a third-party software authenticates with **Blackbaud CRM**, **Altru** or **ResearchPoint**, it uses the proxy user display name along with the PAT and the **Blackbaud CRM**, **Altru** or **ResearchPoint** client database.



Proxy users are non-interactive and don't have email addresses.

The **Application User Page** has a new tab labeled **Proxy Users** that is only visible for application users who are proxy owners. This tab lists the proxy users belonging to that proxy owner. The proxy users are hyperlinked and you can access their **Application User Page** by clicking on their name.

Application Users

T01\Nikki5740tsc - Application User

Display name: T01\Nikki5740tsc
Is system administrator: Yes

Linked to constituent:
Can customize home page: Yes

Site:
Is active: Yes

System Roles
Permissions
Business Process Ownership
Tasks
Features
Code Tables
Batch Types
KPIs
Proxy Users
Email Preferences

Proxy users (1)
More

Name
Test Proxy User A

The **Application User Page** has a **Personal Access Token** tab that is only visible for application users who are also proxy users and a **Summary** section indicating their proxy owner.

Application Users

Test Proxy User A - Application User

Display name: Test Proxy User A
Is active: Yes

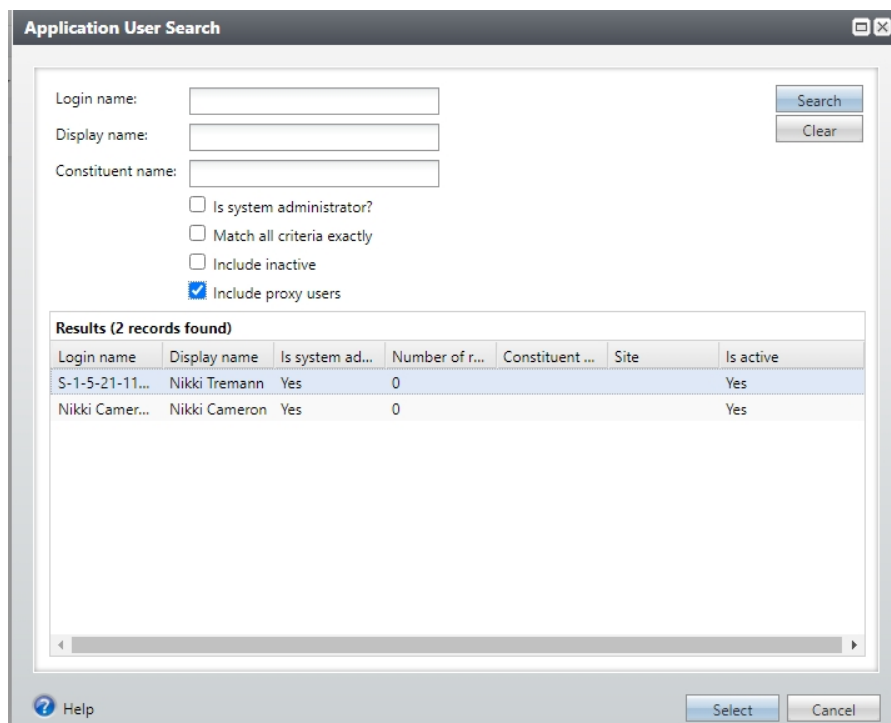
Proxy owner: T01\Nikki5740tsc

System Roles
Permissions
Tasks
Features
Code Tables
Batch Types
KPIs
Email Preferences
Personal Access Token

Personal access token (0)
Add
Filters
More

Name	Is active	Created on	Expires on	Reason
------	-----------	------------	------------	--------

The **Application User Search** feature has a filter to allow searching for proxy users.



**Application User Search**

Login name:  Search

Display name:  Clear

Constituent name:

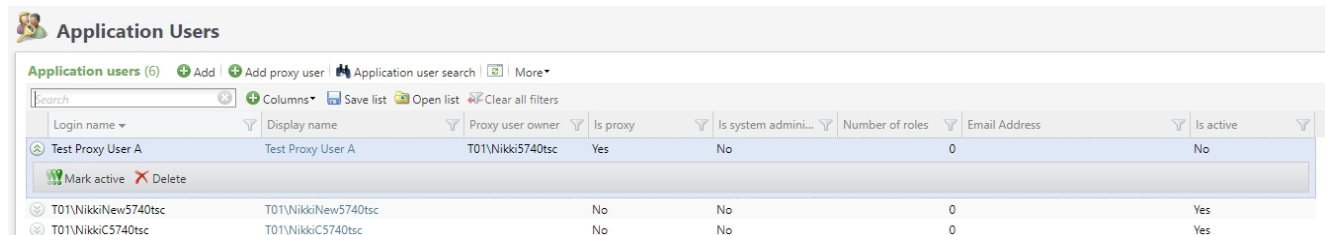
☐ Is system administrator?  
☐ Match all criteria exactly  
☐ Include inactive  
☒ Include proxy users

**Results (2 records found)**

Login name	Display name	Is system ad...	Number of r...	Constituent ...	Site	Is active
S-1-5-21-11...	Nikki Tremann	Yes	0			Yes
Nikki Camer...	Nikki Cameron	Yes	0			Yes

Help Select Cancel

Proxy users are marked inactive after five consecutive failed attempts to authenticate. If a proxy user is marked active, they can attempt to authenticate.



**Application Users**

Application users (6) Add Add proxy user Application user search More

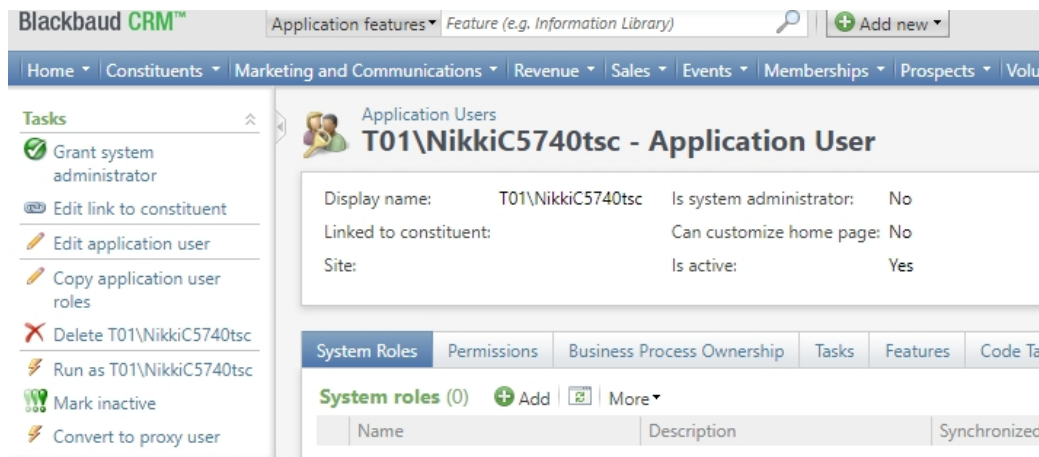
Search Columns Save list Open list Clear all filters

Login name	Display name	Proxy user owner	Is proxy	Is system admini...	Number of roles	Email Address	Is active
Test Proxy User A	Test Proxy User A	T01\Nikki5740tsc	Yes	No	0		No
T01\NikkiNew5740tsc	T01\NikkiNew5740tsc		No	No	0		Yes
T01\NikkiC5740tsc	T01\NikkiC5740tsc		No	No	0		Yes

Mark active Delete

## Convert Proxy User

Proxy users can be created in the system by converting existing application users. On the **Application User Page**, new tasks are available for a candidate application user.



**Blackbaud CRM™** Application features Feature (e.g. Information Library) Add new

Home Constituents Marketing and Communications Revenue Sales Events Memberships Prospects Volu

**Tasks**

- Grant system administrator
- Edit link to constituent
- Edit application user
- Copy application user roles
- Delete T01\NikkiC5740tsc
- Run as T01\NikkiC5740tsc
- Mark inactive
- Convert to proxy user

**Application Users**

**T01\NikkiC5740tsc - Application User**

Display name: T01\NikkiC5740tsc Is system administrator: No

Linked to constituent: Can customize home page: No

Site: Is active: Yes

**System Roles** Permissions Business Process Ownership Tasks Features Code Ta

**System roles (0)** Add More

Name	Description	Synchronized
------	-------------	--------------

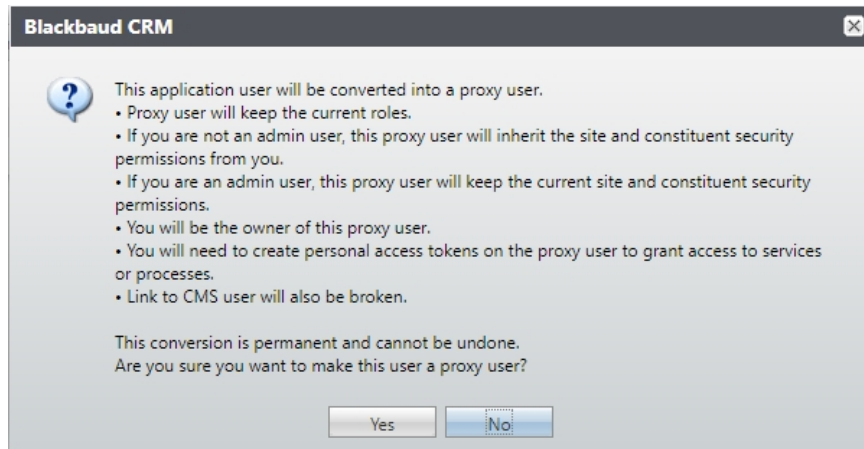


The display name is based on the AD (Active Directory) username related to the unique AD name. e.g., Blackbaud\Bob.Smith would still have the display name Blackbaud\Bob.Smith after conversion. The application user attempting the conversion is the proxy owner of the proxy user.

Only certain application users can be converted to proxy users and in the cases below the **Convert to Proxy User** task isn't visible.

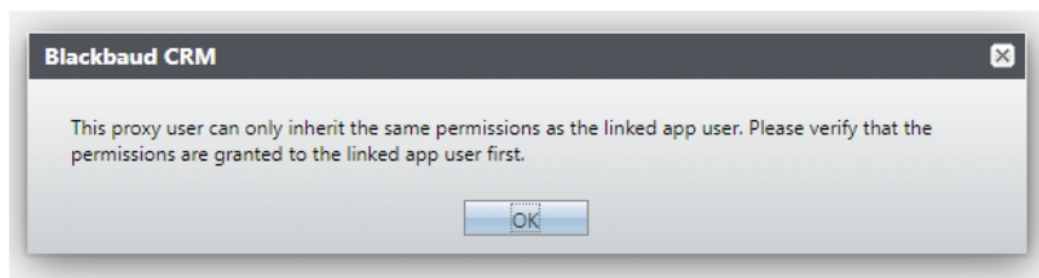
- System, BBJobUser, **Blackbaud ID** application users and application users who have system administrator privileges can't be converted to proxy users.
- An application user who is already a proxy user can't be converted.
- An application user can't convert themselves to be a proxy user (they can't be their own proxy owner).
- An application user who is already a proxy owner can't be converted.

Conversion to a proxy user is a one-way process. If an application user is accidentally converted to a proxy user it isn't possible to convert them back to an AD user or **Blackbaud ID** user. There is a warning message displayed before conversion.



If an AD application user is converted to a proxy user it's possible to add the AD application user again, but the same AD user can't be converted to be a proxy user a second time.

When converting an application user to a proxy user, the system roles are maintained. The proxy owner needs to have the same or more permissions than their proxy user. If the proxy owner to be (i.e., the application user doing the conversion) doesn't have sufficient system roles (not having the system roles themselves or not a system administrator) then an error message is shown, and the application user isn't converted to a proxy user.





When conversion is successful the application user becomes the proxy owner of the newly converted proxy user. The proxy user then has their pre-existing email address removed.

# Disabling and Deleting Non-Interactive Users

## Inside of the *Blackbaud ID* Environment

Application users with access to the **Application User Page**, proxy owners and proxy users can be marked inactive.

Once marked inactive, users can't login successfully until they are marked active again. When a proxy user is marked inactive, all their PATs are revoked. If a proxy user is marked active again, the proxy owner has to add a new PAT for their proxy user before they can successfully log in.

When a proxy owner is marked inactive, all their proxy users and their corresponding PATs are marked inactive. If a proxy owner is marked active, their proxy users remain inactive and would need to be individually marked active. An inactive proxy owner can't mark its proxy users as active.

## Outside of the *Blackbaud ID* Environment

When an application user is marked inactive on the **Application User Summary Page**, there is an option to provide a reason for the inactive status. In each of the following cases, a default reason is used to explain why each of the users are automatically marked inactive. Proxy users are marked inactive when their proxy owner is marked inactive. Proxy users are also marked inactive when failing to successfully login after 5 tries.

## In Both Environments

A proxy owner can't be deleted but can be marked inactive. To delete a proxy owner, each of their proxy users must be deleted before deleting the proxy owner.

# Proxy User Permissions

**Blackbaud CRM** has improved usability by helping with assigning system roles and permissions to application users. An application user's permissions within the system are controlled by the system roles they have, and the site and security groups granted for those roles.

Application users in **Blackbaud CRM** can have system administrator privileges granted which gives them overriding rights to all records and features. There are features granted to all system roles within **Blackbaud CRM**, **Altru**, and **ResearchPoint**. Each system role can be given to an application user with different site security or group security permissions.

System Administrator	Proxy Owner	Proxy User
has all system roles	can generate Proxy Users	cannot exceed its Proxy Owner's permissions
can be a Proxy Owner	can own multiple Proxy Users	cannot be a system administrator
	can affect Proxy User system roles when changing permissions	permissions can be edited by their Proxy Owner

**Note:** In **Blackbaud CRM**, proxy owners have system administrator privileges. Updating the system role permissions for a proxy owner who is also a system administrator won't affect the system role privileges for any of their proxy users.

**Note:** A proxy user can only have a system role if its proxy owner does as well. If the proxy owner is a system administrator, the proxy user can have any system role.

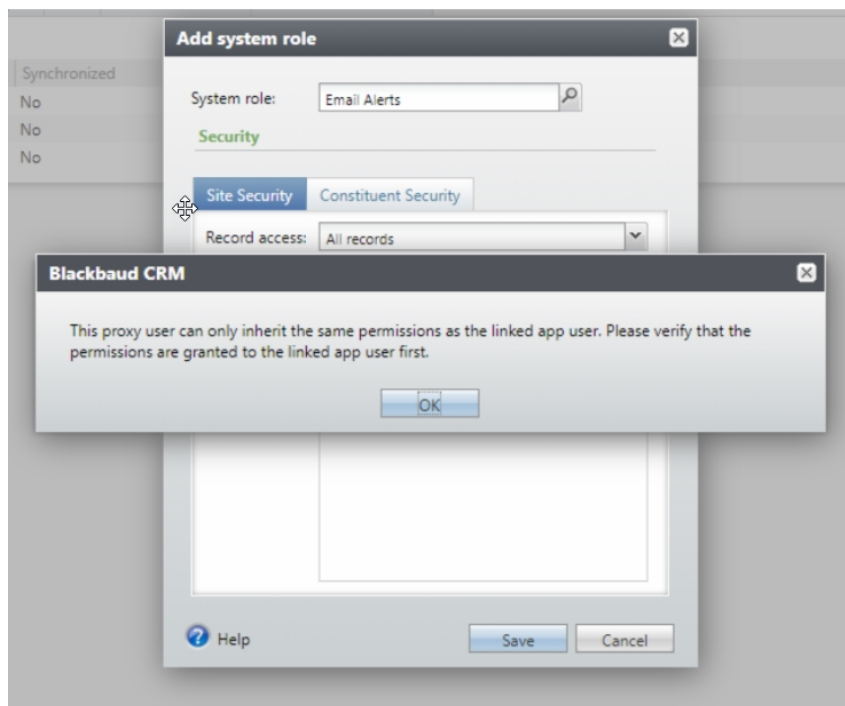
## System Role Management

### When adding a System Role to a Proxy User

Proxy users can be added via the **Add System Role** form from the proxy user **Application User** page or from the **Add Application User to the System Role** field.

These methods are the same for any standard application user adding a system role to a proxy user or vice versa.

Additional permissions checking takes place once the form is saved. If the form is canceled, the application user won't have the system role added. If the form is saved but the proxy owner doesn't have the system role or the system role with sufficient site and constituent security permissions then an error is shown, and the proxy user won't have the system role added.



### Add a System Role for a Proxy Owner

Adding a system role to a proxy owner is just like adding a system role to any application user. Increasing permissions of a proxy owner won't result in permissions being reduced below those of its existing proxy users. This doesn't require any additional checking, so there is no change to add a system role to a proxy owner.

### Edit a System Role for a Proxy User

Like adding a system role, editing a system role looks the same. However, checking takes place on save. It ensures that the system role exists for the proxy owner and the permissions for site and constituent security on the proxy user are the same or less. If the edit on the system role for the proxy user tries to assign higher permissions than the proxy owner, the same error message as above is shown.

### Edit a System Role for a Proxy Owner

When using the edit system role from the **Application User** page for a proxy owner there is a visual difference.

The **Proxy user list** explains that when editing the system role on the proxy owner their proxy users who have that system role are affected. It then lists the proxy users who are affected. When the form is saved, the site and constituent security permissions for the system role on the proxy owner are saved. The site and constituent security permissions for their proxy users with the system role are updated. If the form is canceled no changes are made to either.

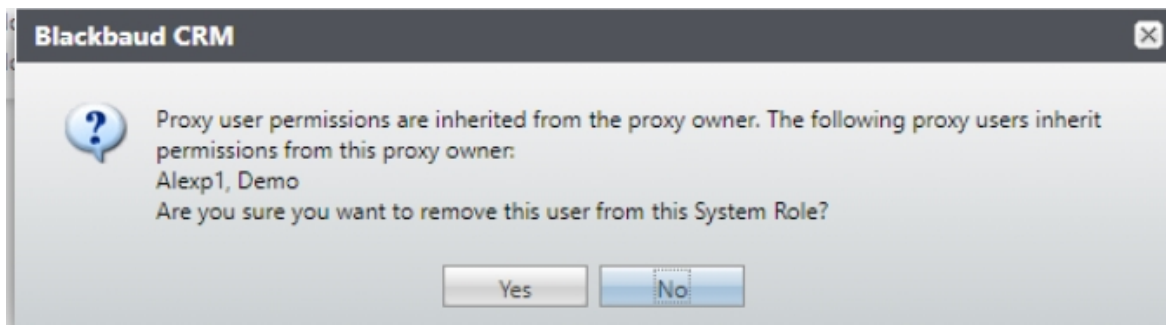
In **Blackbaud CRM**, the proxy owner has system administrator privileges and access to everything regardless of what system roles may or may not be explicitly listed on their record. Changing the system role and permissions on the proxy owner doesn't have implications for the proxy user. The form looks as it did previously with no additional warning required. Updating the system role permissions for a proxy owner who is also a system administrator won't affect the system role privileges for any of their proxy users.

### Delete System Role from Proxy User

Reduction in rights is the same for any application user.

### Delete System Role from Proxy Owner

If a system role is removed from a proxy owner, it gets removed from all its proxy users. The delete action shows a warning that lists the proxy users that are affected.



When the proxy owner is a system administrator, deletion of a role on the proxy owner doesn't affect their proxy users and no warning is shown.

### Copying System Roles

System roles can be copied from one application user to another using the existing functionality. In cases where application users are proxy users or proxy owners require additional permissions checking and handling.

#### Copy a System Role to a Proxy User When Their Proxy Owner is a System Administrator (*Blackbaud CRM* only)

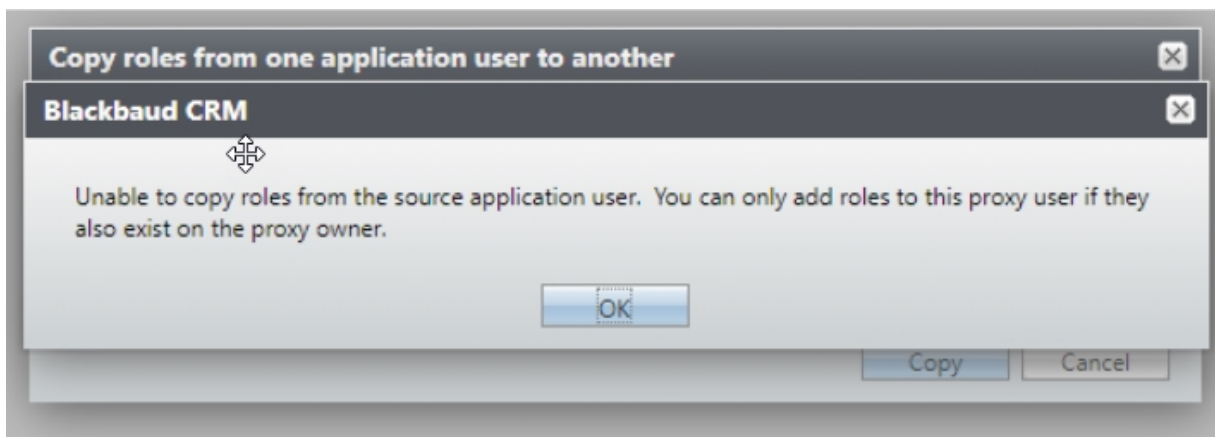
When the proxy owner is a system administrator, the proxy user can have any system roles with any system permissions. In this case it isn't necessary to do any additional checking before allowing the copy. The system roles, site and constituent security permissions are copied from the source application user to the target proxy application user.

#### Copy a System Role to a Proxy Owner who is a System Administrator (*Blackbaud CRM* only)

This isn't allowed. The copy functionality isn't available for application users who are system administrators.

#### Copy a System Role to a Proxy User When Their Proxy Owner isn't a System Administrator

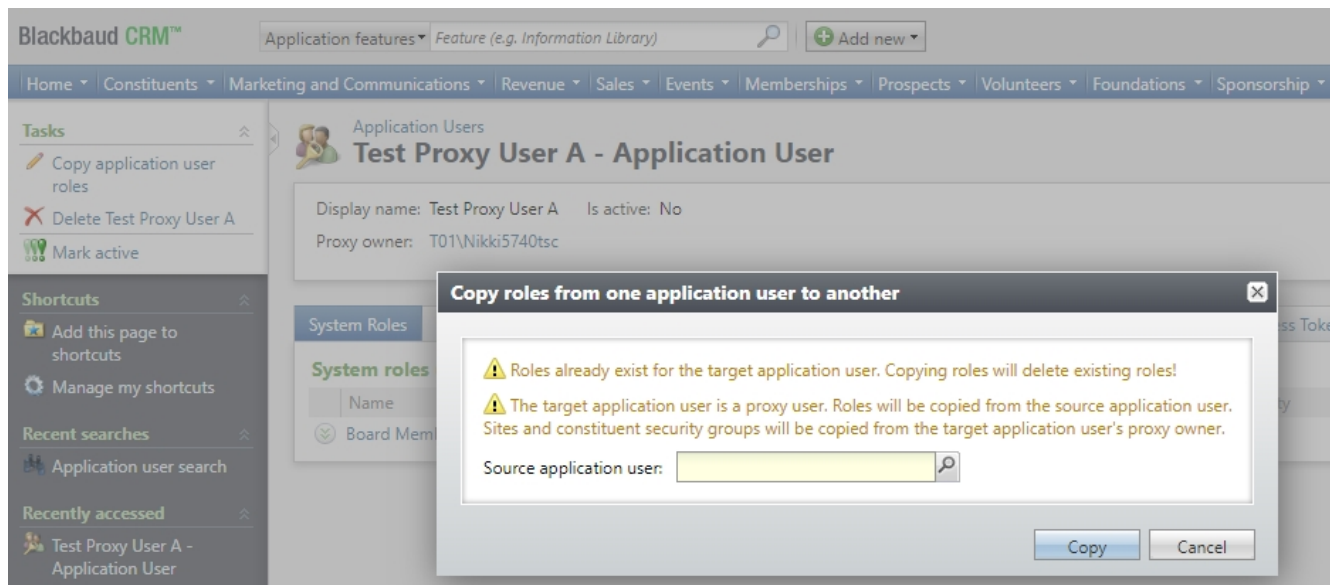
When copying from a source application user to a target proxy application user, the source application user's system roles are compared to those of the proxy owner. If the proxy owner doesn't have the system roles that the source application user has, the copy won't be allowed.



If the proxy owner has the system roles that the source application user has, copying is allowed. The target proxy application user has all the system roles of the source application user.

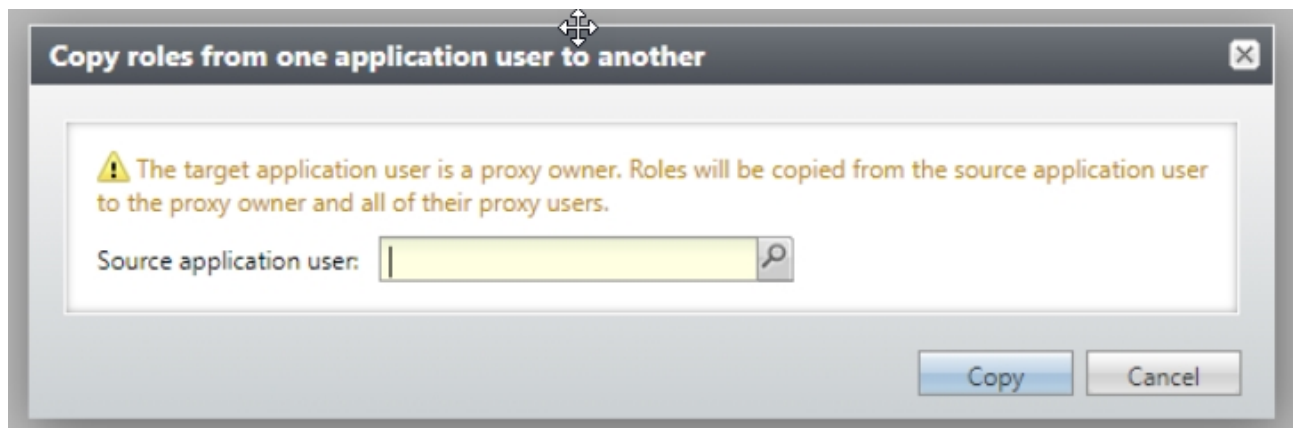
To ensure the proxy user doesn't have site and constituent security permissions exceeding that of a proxy owner, the target proxy application user is given the site and security permissions of the proxy owner for each role - NOT the site and security permissions of the source application user. This differs from the copy functionality between application users where both system roles and site and constituent security permissions are copied from the source application user.

The user is informed about this behavior when the target application user is a proxy user.

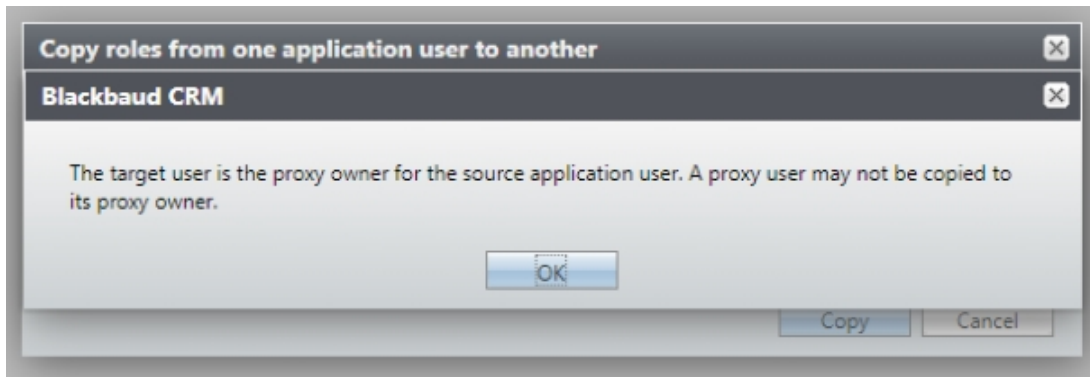


### Copy a System Role to a Proxy Owner When They are Not a System Administrator

System roles and site and constituent security permissions are copied from the source application user to the target proxy owner application user and all proxy users under that proxy owner.



Previously, copy functionality didn't allow an application user to be both the target and the source for the copy. Now, a source application user who is a proxy user can't be copied to a target of their own proxy owner.



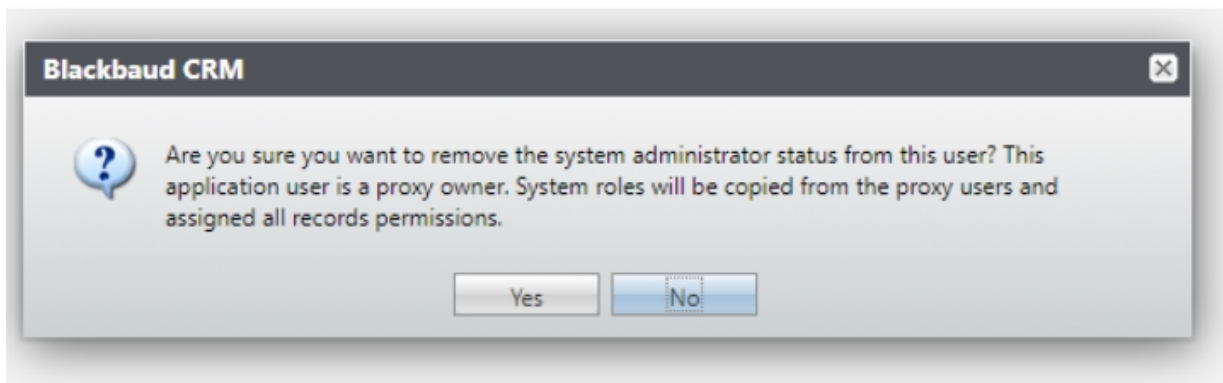
A proxy user can be a source application user and be copied to a different proxy owner or proxy user.

### **Revoke System Administrator Privileges for a Proxy Owner (*Blackbaud CRM* only)**

If a proxy owner has revoked system administrator privileges, they may have added roles explicitly added to their record. The proxy owner is given any necessary system roles with all records permissions when their system administrator privileges are revoked. Proxy owners inherit all system roles belonging to their proxy users. The system roles on the proxy owner's record can then be examined and permissions further reduced at this point.

Granting and revoking system admin rights for application users repeatedly isn't recommended.

If a proxy owner has system roles with various site and constituent security permissions is granted system administrator privileges and has those immediately revoked, their system roles, site and constituent security permissions are upgraded to **All records**.



**Note:** Proxy users can't access the webshell but are used by applications to authenticate. The applications can access the API endpoints for AppFxWebService and bizops.

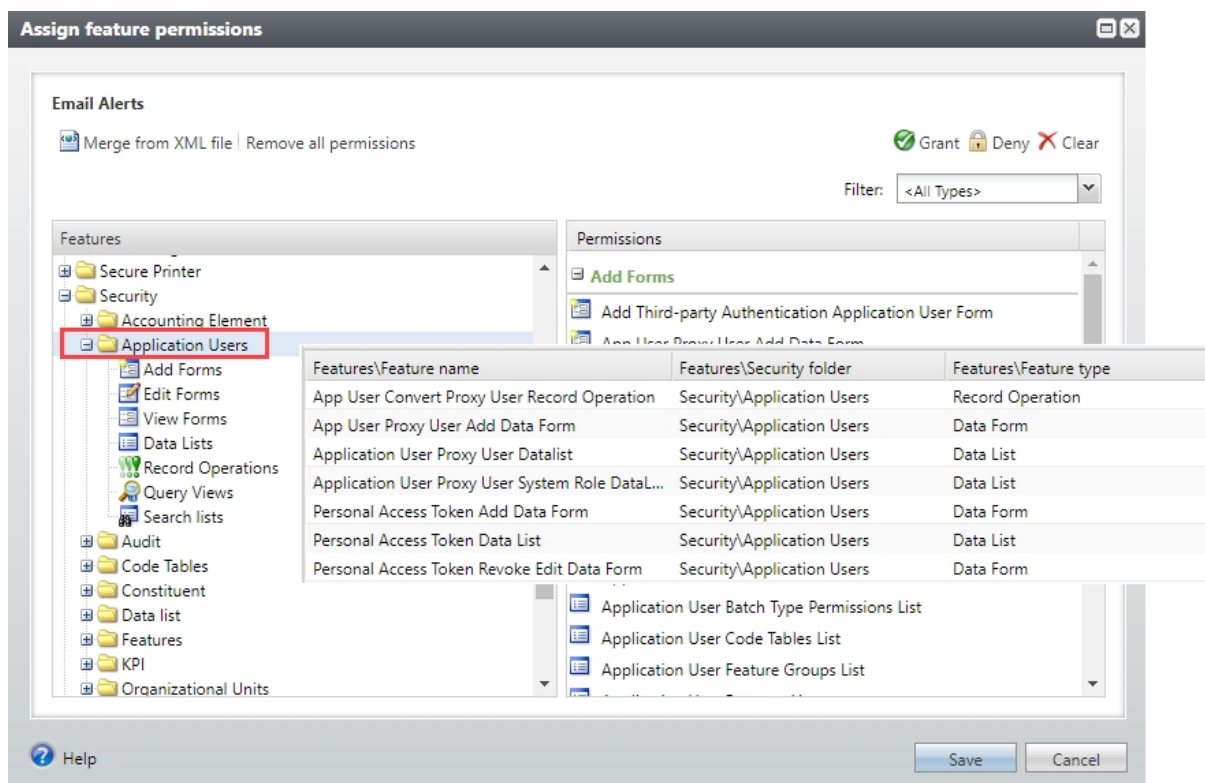
**Note: Edit Site Hierarchy (*Blackbaud CRM* only)** By editing the site hierarchy, you can break the proxy user / proxy owner permission hierarchy rule and end up with a proxy user who has more permissions than its proxy owner. This is an irregular and unusual scenario. Changing the site hierarchy in such a way isn't recommended.



## Update System Role Feature Permissions

An application user must have permissions to use the proxy user management features. proxy users are application users with a role that have access to the **Application User Page**, and the ability to add an AD (Active Directory) or **Blackbaud ID** application user. Application users with system administrator privileges also have access to these features. Application users that don't have the appropriate permissions or aren't system administrators can be granted access to these features via a system role.

The proxy user management features are immediately available to the System Role Administrator - system role. Any application user can be added to this role or any other system role within **Blackbaud CRM** by accessing **Security > Application Users** and making the appropriate selections.



## Personal Access Token UI Management

A proxy user is a non-interactive user supported by third party software, that needs to authenticate with the Infinity platform.

A regular interactive application user needs a username and password to authenticate. Sometimes those users have added authentication requirements such as MFA (Multifactor Authentication), or database authentication. A proxy user needs a username and PAT (Personal Access Token).

### PAT Add

Only a proxy owner can add a PAT to their proxy user. On the **Application User Summary Page**, a proxy user has an added tab **Personal Access Token** with an available **Add PAT** action.

Application Users  
**Test Proxy User A - Application User**

Display name: Test Proxy User A    Is active: No  
 Proxy owner: T01\Nikki5740tsc

System Roles   Permissions   Tasks   Features   Code Tables   Batch Types   KPIs   Email Preferences   **Personal Access Token**

**Personal access token** (0)   [Add](#)   [Filters](#)   [More](#)

Name	Is active	Created on	Expires on	Reasc
------	-----------	------------	------------	-------

Clicking on **Add** opens a dialog box.

**Add a personal access token** ✕

Name of service or process that uses this token:

This is your new personal access token. Copy and paste it to your service or process now. Remember, it cannot be viewed or changed later!

**TbvfvkfwmgwdEejTDCn4LXAiqwuaMTjf07wjJv6gojwK8lxN56XQ** [Copy](#)

☐ I have copied the personal access token to a consuming service.

[Help](#)   [Save](#)   [Cancel](#)

Once the PAT is generated and displayed, the proxy owner must copy the PAT because it won't be available in the future. The PAT needs to be copied and pasted into the third-party software. The name of the service should be entered in the dialog box. This is the nickname for the PAT that is displayed to the application user when they are looking at their PATs. To ensure that the PAT has been copied correctly, the proxy owner can use the copy button and confirm copying with the checkbox.

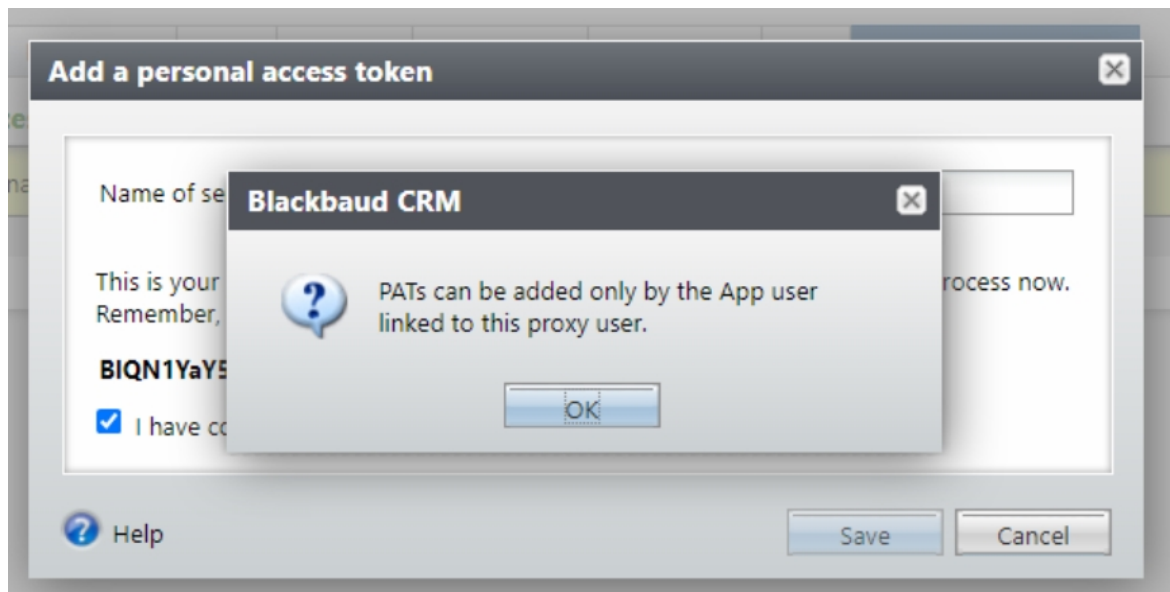
If the PAT add is canceled, a PAT won't be created, and the PAT previously copied can't be used to authenticate. If the PAT is created, it gets stored and encrypted. The requirement to copy using the copy button ensures that the PAT remains secure. The PAT won't be visible within **Blackbaud CRM** or **Altru** again.

The example PAT above has been added, is currently active and within date. The PAT is unique to the proxy user for which it was added within the **Blackbaud CRM**, **Altru**, or **ResearchPoint** database where the proxy user exists.

**Note:** The PAT can only be used to authenticate for that proxy user to gain access to information within that database.

Only a proxy owner can add a PAT for a proxy user that belongs to them. If an application user tries to add a PAT for a proxy user that isn't theirs, they are shown an error.





A proxy user can only have 2 active PATs. If a proxy user already has 2 active PATs and they need to add a new PAT, the proxy owner must first revoke one of the existing PATs.

### PAT Revoke

An active PAT can be revoked. This is a one-way process. A revoked PAT isn't valid to use, and the proxy user won't be able to authenticate. The proxy owner has the right to revoke a PAT. Another application user with suitable privileges, such as a system administrator, also has the right to revoke a PAT.

When a PAT is revoked manually using the revoke button, the user can enter a revoked reason. This appears in the PAT data list for the process user.

Application Users  
**Test Proxy User A - Application User**

Display name: Test Proxy User A    Is active: Yes  
 Proxy owner: T01\Nikki5740tsc

System Roles   Permissions   Tasks   Features   Code Tables   Batch Types   KPIs   Email Preferences   **Personal Access Token**

**Personal access token (1)**   Add   Filters   More ▾

Name	Is active	Created on	Expires on	Reason
Demo	Yes	27/09/2022	27/09/2023	

✖ Revoke PAT

The PAT data list can be configured to show both active and revoked PATs.

Application Users

Test Proxy User A - Application User

Display name: Test Proxy User A

Is active: Yes

Proxy owner: T01\Nikki5740tsc

System Roles

Permissions

Tasks

Features

Code Tables

Batch Types

KPIs

Email Preferences

Personal Access Token

Personal access token (2)

+ Add

Filters

More

☒ Include inactive tokens

Apply

Reset

Name	Is active	Created on	Expires on	Reason
Demo 2	No	27/09/2022	27/09/2023	User is inactive
Demo	Yes	27/09/2022	27/09/2023	

PAT Revoke Reason Code Tables

Any reason entered by the application user for PAT revocation is added to the PAT revoke reason code table. These reasons can also be accessed and edited in their code tables found in the **Administration functional** area within **Blackbaud CRM** under **Data Code Tables**.

Code Tables

Code tables (2)

Filters

More

Category: Application User

Apply

Reset

Category	Code table name
Application User	Application User Inactive Reason
Application User	Personal Access Token Revoke Code

Show lookup

Edit sort method

Assign permissions

Personal Access Token Revoke Code

PAT is expired

User is inactive

+ Add

Edit

Delete

Help

Close

Reason codes in this table are displayed in the drop-down list on the PAT revoke edit form. A reason can be selected at this time, or a new reason can be added.

Code Tables

### Personal Access Token Revoke Code Table Entries

Personal Access Token Revoke Code table entries (3) + Add Filter 2 More

Description	Active	Sites
PAT is expired	Yes	All sites
User Error	Yes	All sites
User is inactive	Yes	All sites

Edit Delete

There are 2 default reason codes that are already provided. These are used by an automatic process.

1. The PAT is expired - When the Proxy User Management, Management Personal Access Tokens global change is run and finds that a PAT is past its expiration date.
2. The User is inactive - When the proxy user is marked inactive, all PATs for that proxy user are automatically revoked.

An application user is free to select one of these default reason codes when providing a reason for the PAT revocation.

If a PAT revoke reason code is added to the code table by a user but isn't actively in use the reason code can be deleted in the **Administration code table**. The 2 default reasons can be edited but not deleted because they are required by automated processes.

When revoked PATs are displayed in the **PAT data list**, they can't be revoked a second time and the revoke button is grayed out.

Application Users

### Test Proxy User A - Application User

Display name: Test Proxy User A    Is active: Yes  
Proxy owner: T01\Nikki5740tsc

System Roles   Permissions   Tasks   Features   Code Tables   Batch Types   KPIs   Email Preferences   **Personal Access Token**

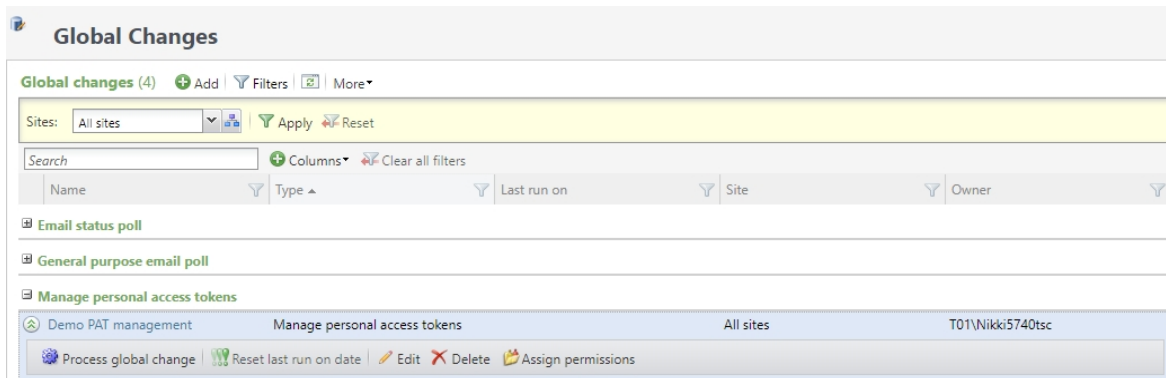
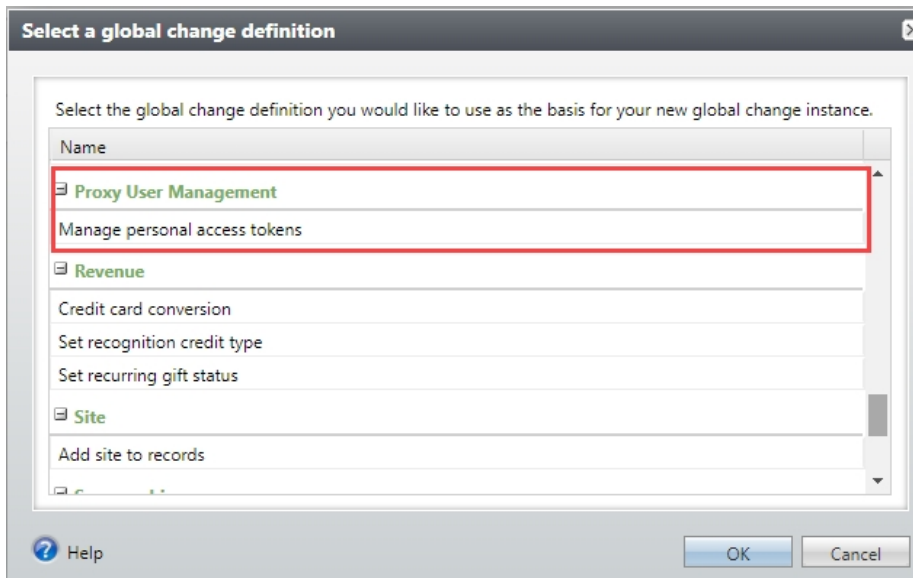
Personal access token (2) + Add Filter 2 More

☒ Include inactive tokens Apply Reset

Name	Is active	Created on	Expires on	Reason
Demo 2	No	27/09/2022	27/09/2023	User is inactive
Revoke PAT				
Demo	Yes	27/09/2022	27/09/2023	

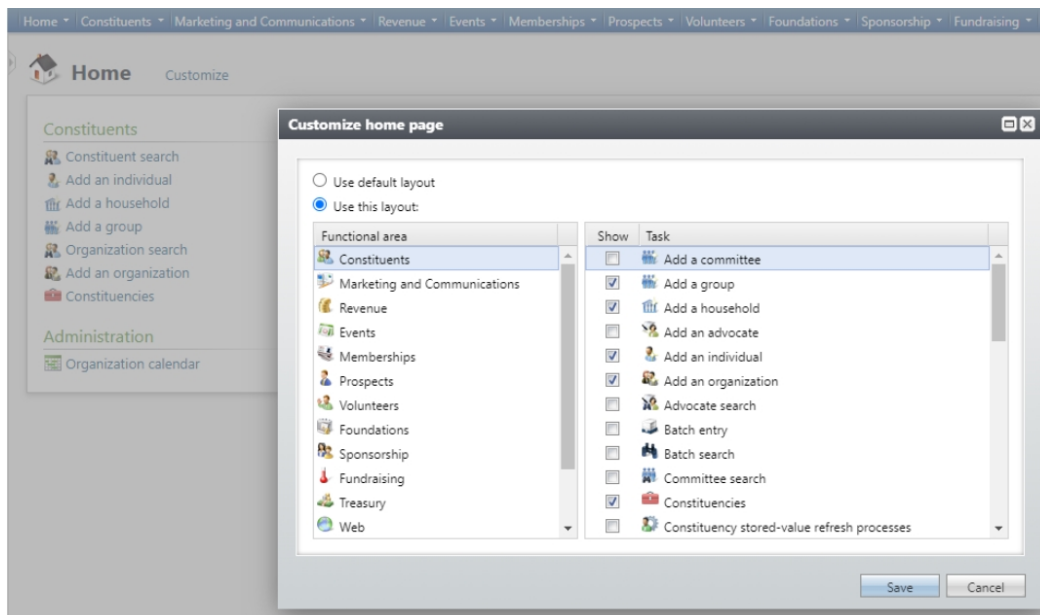
## PAT Expiration Global Change Business Process

A user can manually revoke and mark their PAT as expired. A global change makes it possible for users to iterate through all PATs and revoke any that have expired. When revoked with this automatic process, the default reason of *PAT is expired* is used. Users can edit the expired default reason text in the code table.



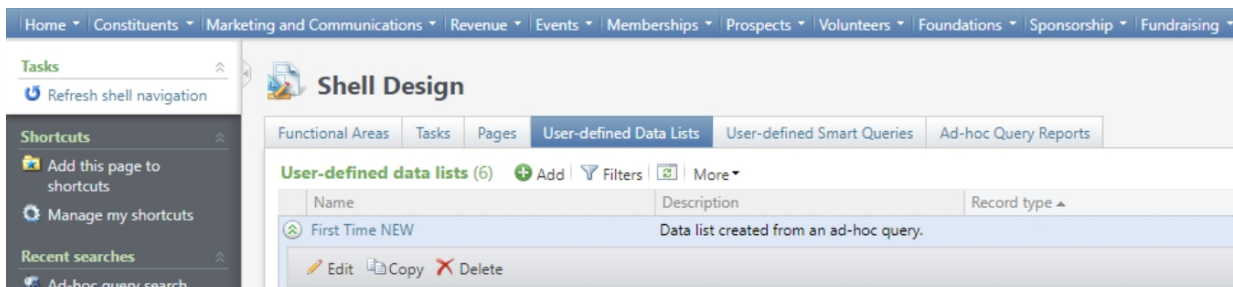
## Default Sort on Customize Home Page

To improve readability, default sort has been added to the **Customize Home Page** to display the **Task lists** in alphabetical order.



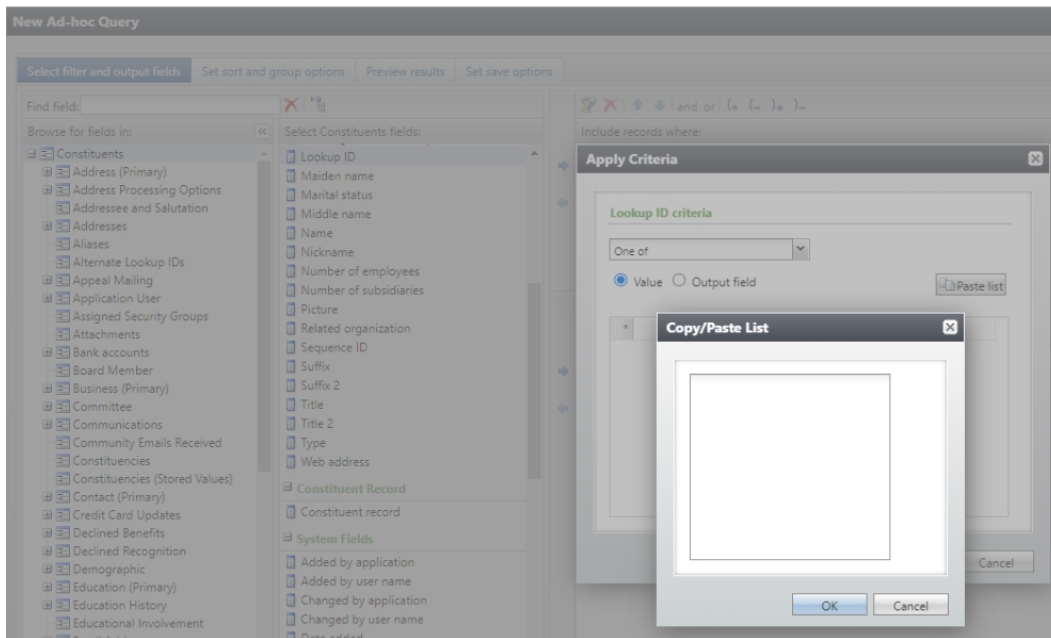
## Copy Function for User-defined Data Lists

To improve efficiency, users can now copy existing **User-defined Data Lists** from **Shell Design**.



## Paste List Button

A new **Paste list** button has been added that allows users to paste lists (such as IDs, ZIP Codes, etc. from an Excel column) into the **Ad Hoc Query One Of** and **Not One Of** filter criteria. The **paste list** button is only available for text and number fields. The button provides a free text area where users can paste a copied list of values, then add the values as rows to the grid based on line breaks as the delimiter.



**Note:** In ad-hoc query there is an existing limit of 255 filter values, and a value can't be longer than 100 characters. Please be mindful of these limits when you are pasting longer lists or values into the Copy/Paste List text area. Currently, the text area itself does not have any of these value or character limits. The system will warn you of the 255-value limit when you try to preview the results or save the query, and it will warn you of the 100-character limit per value when you try to apply the criteria. If you have more than 255 filter values that you would like to include in the criteria, then you can add multiple filters with the combining operators. Explicitly including a large number of values (many thousands of values) using the *One Of* and *Not One Of* filter operators could slow down your query or cause an error.

## Mini Donation Form Enhancements

**Blackbaud Internet Solutions** now provides the option to configure **Personal Information** collection on the **Mini Donation Form**. When enabled, the donor sees the available fields on the **Personal Information** tab of the form.

Gift Information

Personal Information

### Personal Info

---

First name\*

John

Last name\*

Donor

Preferred Email\*

JDonor@blank.org

Country\*

United States

Address:\*

65 Fairchild Drive

132 characters left.

City\*

Chareleston

State:\*

SC

ZIP:\*

29494

Home Phone

Donate Now

Back

To enable collection of personal information from the user, click the enable check box **Collect personal and biographical information from the donor**.

**Note:** By default, this checkbox will be unchecked.

Donor Information Fields

☒ Collect Personal and Biographical information for the donor

When unchecked, Personal Information for the donor will be limited to the fields included on the Payments screen (Name, Address and Email address).

	Include	Field Name	Label	Required	
⋮	<input type="checkbox"/>	Title	<input type="text" value="Title"/>	<input type="checkbox"/>	N/A
⋮	<input checked="" type="checkbox"/>	First name	<input type="text" value="First name"/>	<input checked="" type="checkbox"/>	N/A
⋮	<input type="checkbox"/>	Middle name	<input type="text" value="Middle name"/>	<input type="checkbox"/>	N/A
⋮	<input checked="" type="checkbox"/>	Last name	<input type="text" value="Last name"/>	<input checked="" type="checkbox"/>	N/A
⋮	<input type="checkbox"/>	Maiden name	<input type="text" value="Maiden name"/>	<input type="checkbox"/>	N/A
⋮	<input checked="" type="checkbox"/>	Preferred Email	<input type="text" value="Preferred Email"/>	<input checked="" type="checkbox"/>	N/A
⋮	<input type="checkbox"/>	Confirm Email Address	<input type="text" value="Confirm Email Address"/>	<input type="checkbox"/>	N/A
⋮	<input checked="" type="checkbox"/>	Formatted Address	<input type="text" value="Formatted Address"/>	<input checked="" type="checkbox"/>	N/A
⋮	<input checked="" type="checkbox"/>	Home Phone	<input type="text" value="Home Phone"/>	<input type="checkbox"/>	N/A

Language Tab

The **Language** tab has newly available fields to allow field label preferences and data entry validation.

Design

Language

Properties

Usage

Targeting & security

Tags

Specify any part text to be replaced with alternate text for a specific language.

Category:

Address

Address

Address Messages

Donation Information

Donation Steps

Step 1 Gift Information

Step 2 Personal Information

Summary

Validation Messages

Language

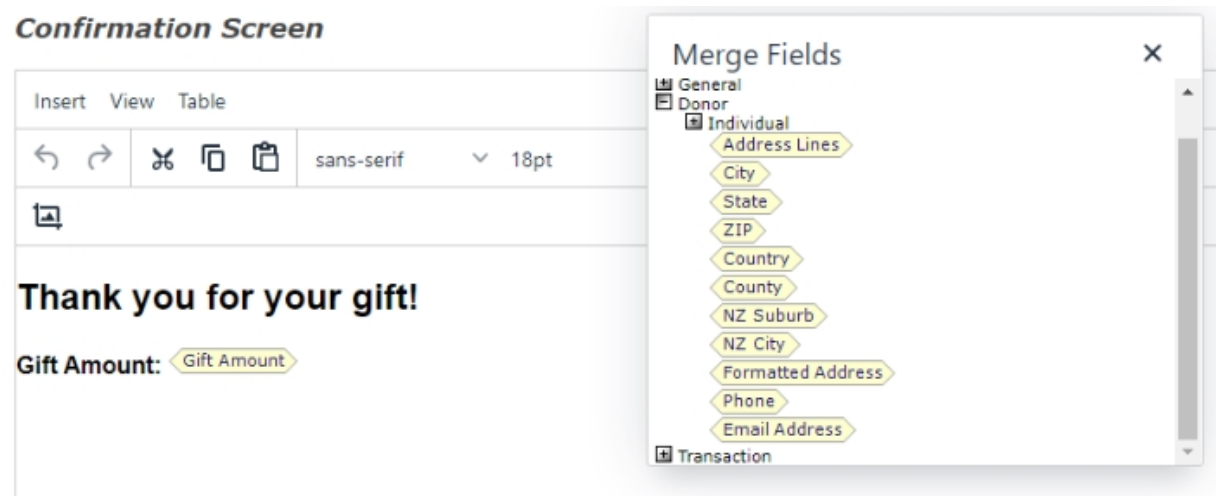
English

Country	message
State (dynamic)	Field label
ZIP (dynamic)	Field label

Confirmation Screen



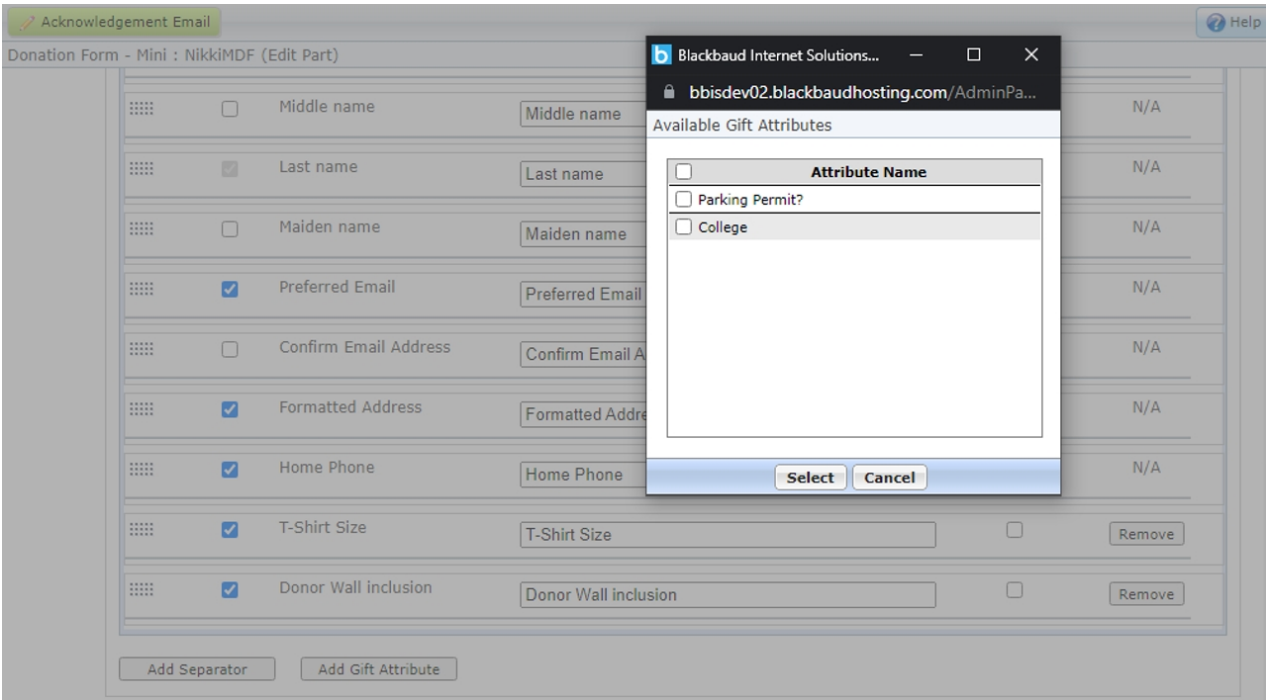
The **Confirmation Screen Merge Fields** take account of the newly available fields to allow a more personalized confirmation display.



**Revenue Attributes**

The enabled **Mini Donation Form** can collect **Revenue Attributes**.

**Tip:** The revenue attributes that appear in this frame are created in **Blackbaud CRM**. After you process a donation transaction, the attributes you select appear on the **Attributes** tab of a revenue record.



From the **Attribute** popup, select the checkbox beside the gift attribute to associate with the part. To make the attributes required, select the checkbox in the **Required** column. To change the text of the attribute on the donation page, enter the text to display in the **Label** field.

**Note:** You can use one-per-record attributes with types of Date, Text, Number, Currency, and Yes/No in the program. Table type attributes are available without being marked as one per record. **Fuzzy Date**, **Constituent Name**, **Memo**, and **Time** type attributes are not available.

## reCAPTCHA on Pledge Requests

With this Service Pack, **Blackbaud Internet Solutions** reCAPTCHA appears on pages when users choose the **Bill Me Later** option during a transaction.

The Following pages and parts are affected by this change:

Pages configured with **Payment 2.0**:

- **Donation Classic**
- **Sponsorship Status**
- **eCard with Donation**

Pages without Payment 2.0:

- **Event 2.0**
- **Donation Classic**
- **eCard with Donation**
- **Sponsorship Status**
- **Personal Page Manager**

## Password Reset Functionality Phase III

With this release of **Blackbaud Internet Solutions**, phase III of the password reset functionality is now available. The new updates are as follows:

- The **RecordNewUserHandler** custom handler no longer accepts password fields. New users are now created using **RecordNewUserHandler** without passwords.
- The application can send a new user welcome email with a password reset link while creating the user via **RecordNewUserHandler** or not, depending on the organization's preference.
- New user signup emails are sent based on the new parameter flag **SkipNewUserWelcomeEmail**.
  - By default, its value is **false** so that current clients using this customer handler don't need to make any changes and can continue to send **Signup** emails along with new users.
  - If you don't want to send welcome emails, update this parameter flag to **true**.

Users can now reset their password via the following methods when the **SkipNewUserWelcomeEmail** parameter flag value is set to true:

- By clicking the **Forgotten password** link from the **login part/login.aspx** page.
- By requesting the organization send the password reset email.

For more information, view page 12 of the [Single Sign-on Overview Guide](#) to learn about the **RecordNewUserHandler** custom handler field table.

## CMS Business Processes Update

With this release, **Blackbaud Internet Solutions** moved all CMS Business Processes to run on SQL Jobs.

Impacted CMS Business Processes are:

1. Jobs available under the **Schedules** tab of **Sites and Settings** section (except **Email** related business processes, as they are already running through SQL Jobs)
2. Jobs running in the background (CMS Checkout Repair, **Blackbaud Secure Payments** Transaction Repair etc.)

## reCAPTCHA on Free Transaction Type

With this release of **Blackbaud Internet Solutions**, reCAPTCHA now displays for free event registrations. This implementation is for **Event 2.0** and **Event Classic** (except **Payment 2.0**).

## Donation Classic with Checkout

With this release of **Blackbaud Internet Solutions**, **Donation Forms** now has its own **New User Signup** email template that can be used to send a **New User Welcome** email when users sign up from the **Donation Classic** page.

A new tab has been created for the welcome email template i.e., **New User Registration** email in **Donation Form** part.

## Deprecation of LinkedIn Group Join

With this release of **Blackbaud Internet Solutions**, the LinkedIn Group Join part (4.0 & 5.0) has been deprecated due to changes in LinkedIn's API. No new instances of this part type can be created. Existing pages will show a yellow banner indicating the part has been deprecated but existing transaction data will be retained.

The LinkedIn setting has been removed from the API tab under **Sites and Settings**.

## Blackbaud ID with SQL Server Reporting Services

Previously, SQL Server Reporting Services (SSRS) worked with Windows Authentication by default and was accessible through Windows credentials.

Historically, established Active Directory (AD) organizational units were added and managed via the **Blackbaud CRM Organizational Units** area. However, with **Blackbaud CRM** moving to a **Blackbaud ID** SSO (single sign-on) approach, this functionality as well as the ability to add domain users in **Blackbaud CRM** and login through to SSRS will be unavailable.

As a result, SSRS has been modified to use **Blackbaud ID** credentials in line with **Blackbaud CRM**.

**Existing users, subscriptions, and custom reports will be automatically migrated to Blackbaud ID SSRS by Blackbaud with the appropriate roles.**

#### **Request Blackbaud ID authentication for SSRS**

1. Ensure that you are on the latest Service Pack and hot fix.
2. You must already have **Blackbaud ID** enabled in the environment(s).
3. File a ticket with Blackbaud Support to enable **Blackbaud ID** authentication for SSRS.
4. Provide the following information to support:
  - a. Name and contact info.
  - b. The **Blackbaud ID** email address of any SSRS **Subscription** owners. If you do not know this information, we can provide a list of existing **Subscription** owners to assist with this.
  - c. **Blackbaud CRM** Environment(s) to be enabled (Staging, Test, Production).
  - d. Preferred date and time.

**Note:** When using SSRS with **Blackbaud ID** in non-production environments, it is strongly recommended to upgrade all environments rather than a subset. If you choose to upgrade some environments but not others, the report servers that are not upgraded will not function properly. If all environments are upgraded, then reports on all of them will function properly and be secured by **Blackbaud ID**.

Upgrading non-production environments will not affect production environments. **Blackbaud ID** can be enabled on report servers in production environments separately and, optionally, at a later date. You can choose to enable **Blackbaud ID Authentication** for SSRS in a lower environment first, before moving to **Production**.

5. Our support team will contact you to confirm and arrange a time to perform the enablement. The enablement tasks don't take long, and a support representative will advise you when these are completed.
6. **Blackbaud Hosting** will enable **Blackbaud ID Authenticated** SSRS.

#### **New Blackbaud CRM Roles for SSRS**

As **Blackbaud ID** SSRS users are tightly coupled with **Blackbaud CRM** Application Users, SSRS roles have been introduced within **Blackbaud CRM** for handling the required permissions.

Managing these roles and permissions is undertaken via **Blackbaud CRM Application Security**. When there is a login to SSRS, it is reflected automatically. Any role or Application User changes in **Blackbaud CRM** are immediately manifested into SSRS.

There are five types of roles that can log in and be authorized in SSRS which have corresponding roles available in **Blackbaud CRM**.

**System Role Search**

Name:  Search Clear

**Results (5 records found)**

Name	Description
ReportAdmins	Browser, Content Manager, My Reports, Publisher, Report Builder
ReportBrowsers	Browser
ReportBuilders	Report Builder
ReportContentManagers	Browser, Content Manager, Publisher
ReportPublishers	Publisher

Select Cancel

These **Blackbaud CRM** Roles are:

1. **ReportAdmins** - has *Browser, Content Manager, My Reports, Publisher, Report Builder* rights.
2. **ReportContentManagers** - has *Browser, Content Manager, Publisher* rights.
3. **ReportBuilders** - has *Report Builder* rights only.
4. **Report Publishers** – has *Publisher* rights only.
5. **ReportBrowsers** - has *Browser* rights only.

These are added to application users via the existing **Blackbaud CRM** system roles workflow. Refer to the **Blackbaud CRM** [Security Guide](#).

**Application Users**  
**John Doe - jd@blank.org - Application User**

Display name: John Doe    Is system administrator: Yes  
 Linked to constituent:    Can customize home page: Yes  
 Site:

**System Roles** | Permissions | Business Process Ownership | Tasks | Features | Code Tables | Batch Types | KPIs | Email Preferences

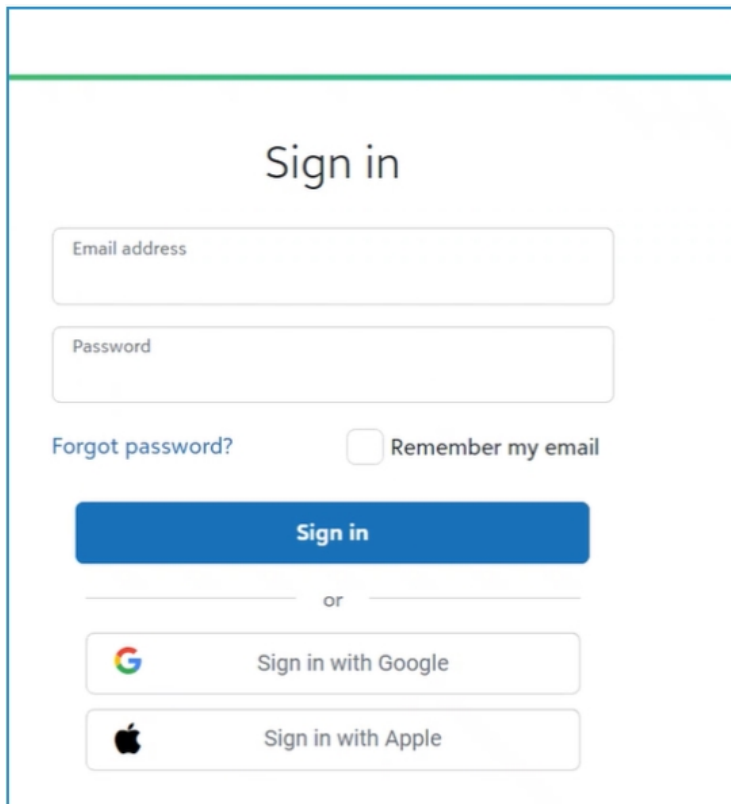
**System roles (2)** + Add More

Name	Description	Synchronized	Site security	Constituent security
ReportAdmins	Browser, Content Manager, My Reports, Publisher, Report Builder	No	All records	All records
ReportBrowsers	Browser	No	All records	All records

**Note:** If your organization does not use SSRS, these new roles can safely be ignored.

### How is SSRS accessed after the **Blackbaud ID** upgrade?

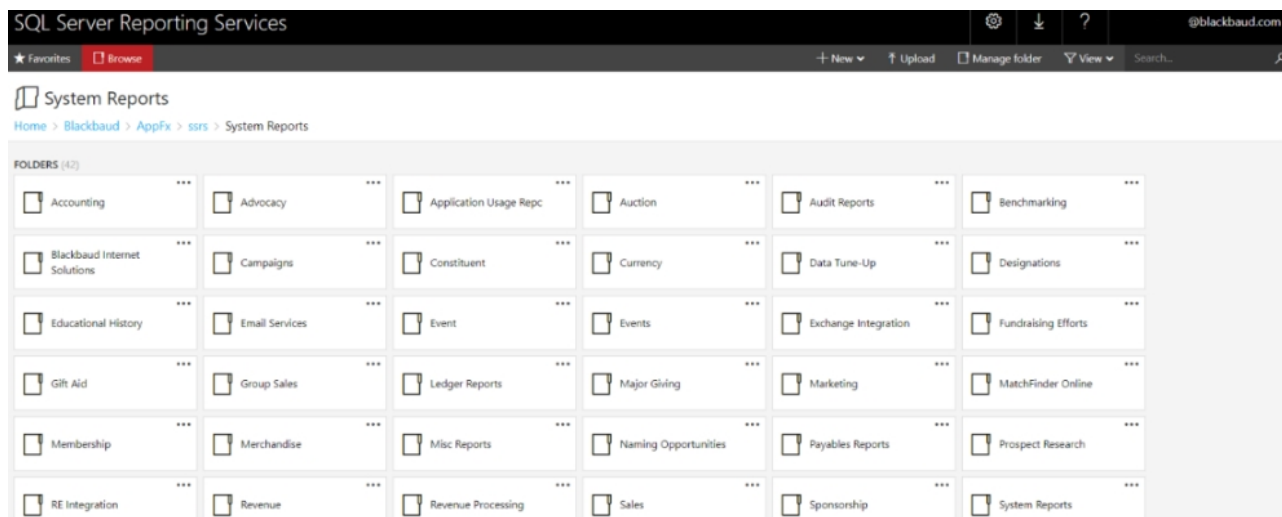
After the upgrade of SSRS to **Blackbaud ID**, when a user accesses a URL for SSRS they are redirected to the signin.blackbaud.com page where they need to enter a valid **Blackbaud ID** username and password. This **Blackbaud ID** user should be mapped to the **Blackbaud CRM** application which has the SSRS instance associated.



After the **Blackbaud ID** login is validated, the user is redirected to the available environments screen (where they can see only those environments to which they have access), in order to choose the environment for which they want to see the reports.



After selecting the environment from the available environments dropdown list, users should click the **Go to Browse** button to open the **SQL Server Reporting Services** folder.



Now users can access reports based on their permission roles in the SSRS.

## Service Pack 33

These features were introduced in Service Pack 33 after the original **CRM 4.0** release.

## SKY API

**Blackbaud CRM** now provides APIs that expose data and functionality for enterprise-level organizations hosted by Blackbaud. SKY APIs are modern, open, industry-standard application programming interfaces that you can use to develop robust applications and extensions.

Please reach out to support and request SKY API access be turned on for your organization's BBCRM environment. Once access has been turned on, SKY API works seamlessly if you have **Blackbaud ID** enabled in your **Blackbaud CRM** environment.

If you don't have **Blackbaud ID** enabled, you can still use SKY API. You can enable SKY API in **Administration** and enable a user to interact with SKY API by going to their **Application User** page and adding a link to **Blackbaud ID**.

To learn more, visit

- [SKY API Developer Resources for Blackbaud CRM](#) ,
- [Support Changelog for SKY API for Blackbaud CRM](#),
- [How to Enable SKY API for Blackbaud CRM On-Premise Environments](#).

## Do Not Text Flag

A new field was added to **Phone Number add/edit** forms to flag as Do not text. This field is available for **Blackbaud CRM**. For more information, see [Add a Phone Number Screen](#).

## Do Not Email Reason Code

A new field was added to **Email Address add/edit** forms to include a Do not email reason code. This field is available for **Blackbaud CRM**. For more information, see [Add an Email Address Screen](#).

## Email Confidential Flag

A new field was added to **Email Address add/edit** forms to mark an email as confidential. This field is available for **Blackbaud CRM**. For more information, see [Add an Email Address Screen](#).

## Run As Rights for Non-System Administrators

**Run As** rights for non-System Administrator users are now available for **Blackbaud CRM**. Only System Administrator users can **Enable Run As** rights for non-System Administrator users. Non-System Administrator users with **Run As** rights enabled can run as any other non-System Administrator user, but can't run as another System Administrator user.

The screenshot displays the Blackbaud CRM user management interface. The top navigation bar includes tabs for Home, Constituents, Marketing and Communications, Revenue, Sales, Events, Memberships, Prospects, Volunteers, Foundations, and Spots. A search bar and 'Add new' button are present. The left sidebar contains a 'Tasks' list with options like 'Grant system administrator', 'Edit link to constituent', 'Edit application user', 'Copy application user roles', 'Delete BLACKBAUD\CharlieJones', 'Run as BLACKBAUD\CharlieJones', 'Mark inactive', 'Convert to proxy user', and 'Enable Run As'. The main content area shows the 'Application Users' section for 'BLACKBAUD\CharlieJones - Application User'. It includes fields for Display name (Charlie Jones), Is system administrator (No), Linked to constituent, Can customize home page (Yes), Site, and Is active (Yes). Below this is a 'System Roles' section with a table listing roles.

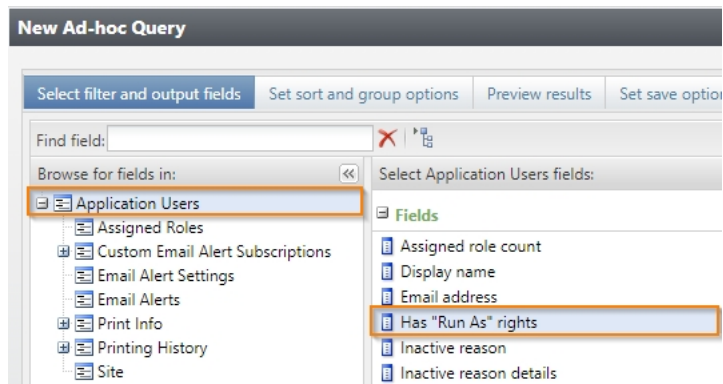
Name	Description
Director of Development	Oversees all aspects of the development office.
System Role Administrator	Users assigned this role can add, edit, and delete users, assign users to system rol

For more information, see [Enable/Disable Run As Rights for Non System Administrator](#) and [Run the Program as a Selected User](#).

## Has Run As Rights for Query


In Ad-hoc query, **Has "Run as" rights** were added to the **Application Users** node for **Blackbaud CRM**.



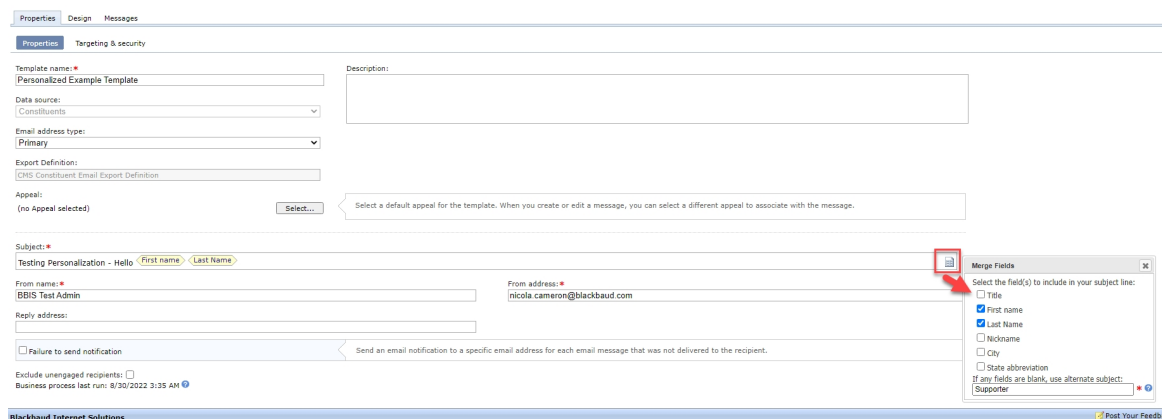


## Personalized Email Subject Lines

**Blackbaud Internet Solutions** users can now add personalized subject lines to their email messages with the following steps:

1. Navigate to **Email**, then **Templates**.
2. Select **New Template**.
3. Assign a unique **Template name**.
4. From **Data source**, select **Constituents**.
5. In the **Subject** field, select the  icon to the right. Available merge fields from **Blackbaud CRM** will appear. Mark the box near the merge field to add it to the subject line.
6. You can type an alternate subject using general terms like donor or supporter that apply to most email recipients. This field appears when merge fields are blank on the record in **Blackbaud CRM**. For example, if your email subject is Dear <First Name> but the recipient's first name is blank in **Blackbaud CRM**, your alternate subject will display as Dear Donor.
7. Complete the remaining required fields.
8. Press Save.
9. Select **New message** to set up an email message using this template.

**Note:** **Settings** and **Subject** lines can be changed at any point on the message level.



## Single Sign-On Deprecation

**Single Sign-On authentication** for *Blackbaud Internet Solutions* was deprecated. Users with out-of-the-box SSO capability enabled can continue using the feature with a visible deprecation notification. After upgrading to Service Pack 33, installations without SSO enabled won't have the SSO sections available.

The **Notice of Deprecation** is visible by following **Administration** to **Sites & Settings, Settings**, and the **API** tab to **Single Sign On** where an SSO private key is present or by following **Administration** to **Settings, Site Settings**, to **Single Sign-On authentication** settings where SSO was enabled.

## reCAPTCHA for Free or Zero Value Transactions

*Blackbaud Internet Solutions* now uses reCAPTCHA on **Shopping Cart** with **Payment 2.0** for the following transaction types:

- **Free Event** type transactions on the **Event Registration Form** part for **Classic**
- **Sponsorship** with **Pay By Check** payment mode on the **Sponsorship** part
- **Free Membership** type on the **Membership** part

## reCAPTCHA for Pledge with Advanced Donation Form

reCAPTCHA for *Blackbaud Internet Solutions* now appears on **Advanced Donation Form** pages when users choose the **Bill Me Later** option during a transaction.

## TinyMCE Upgrade to 6.1.2

*Blackbaud Internet Solutions* has upgraded TinyMCE to version 6.1.2 in **Email Templates, Email Messages, Layouts, Discussion Groups**, and **Formatted Text and Image** parts.

## Retired News Reader Part

*Blackbaud Internet Solutions'* **News Reader** part has retired. New instances of this part type cannot be created. Existing pages now display a yellow banner to identify the deprecated part.

This change affects:

- the **Personal Page Element** and **Manager** parts
- the **Chapter Page Element** and **Manager** parts

## Service Pack 34

These features were introduced in Service Pack 34 after the original **CRM 4.0** release.

### Recurring Gift Payment Handling: Enable Overpayment Rule in Batch and Import

In **Recurring gift payment handling** configuration, when the Overpayment rule is selected with the options to first apply the excess amount to past installments with a balance and then to add a donation for any remaining excess, you will see the option to **Enable recurring gift payment handling rule in batch and import**. This will apply the recurring gift payment handling rule for adding a donation for any remaining excess in batch and import. You will have to validate the batch before committing, and the system will add the donation for the remaining excess on validation.

**Recurring gift payment handling**

How would you like to handle payments when more than one past installment has a balance?

☐ Apply the payment to the oldest installment with a balance

☒ Apply the payment to the most recent installment with a balance

How would you like to handle payments that OVERPAY the installment balance?

☒ First, apply the excess amount to any other past installments with a balance (from most recent to oldest)

Then...

☐ Apply any remaining excess to future installments

☐ Increase the installment amount to include the excess payment amount (other installment amounts are unaffected)

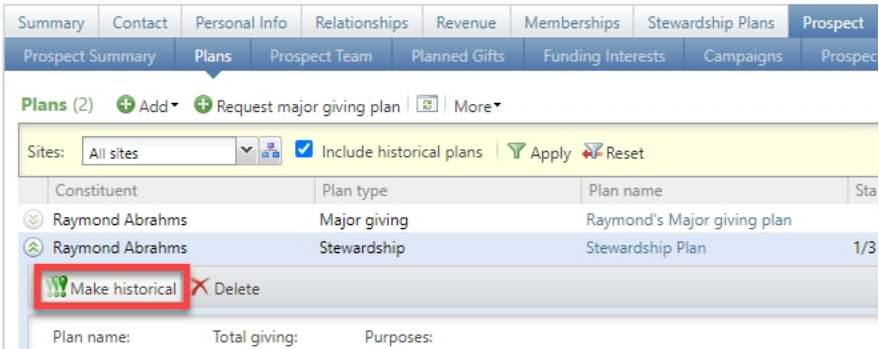
☒ Add a donation for any remaining excess

☐ Enable recurring gift payment handling rule in batch and import

☐ Do not apply the excess amount to other past installments with a balance

## Make Stewardship Plans Historical

The ability to mark a Stewardship Plan as Historical is now available in **Blackbaud CRM**. Similar to Prospect Plans, you can remove any Stewardship Plan that is no longer relevant if you designate the plan as "Historical." This designation hides the plan from the **Stewardship Plans** and the **Prospect > Plans** tabs, but it does not delete the plan from your system.



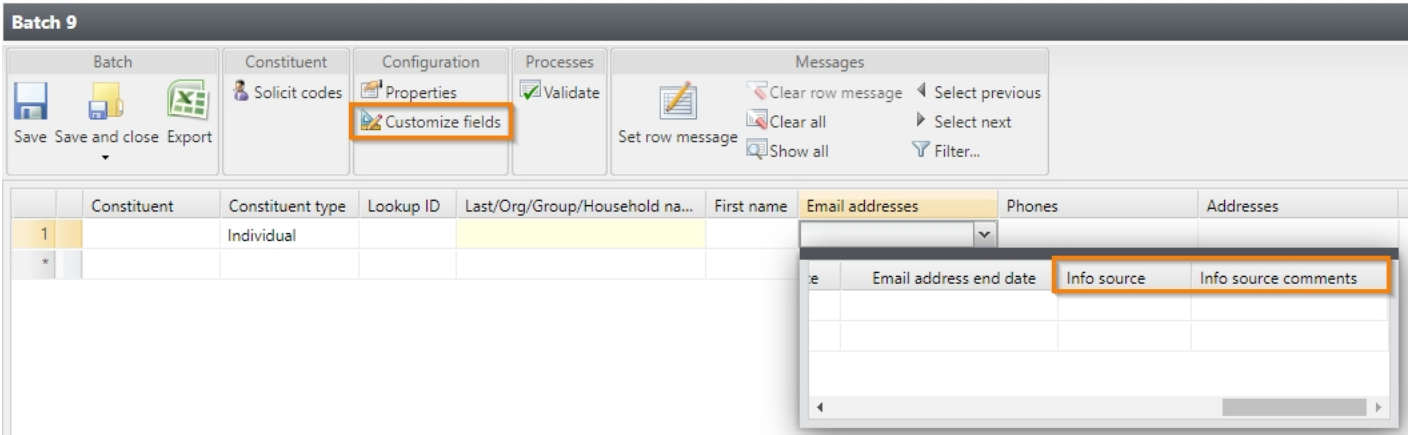
There are two ways to mark a Stewardship Plan as Historical:

- 1. From a Constituent profile, select **Prospect**, open the **Plans** tab, and expand the row for a Stewardship Plan. Select **Make Historical**.
- Or,
- 2. From a Stewardship Plan page, under the **Tasks** frame on the left side, select **Make Historical**.

**Note:** You cannot make a Stewardship Plan historical if steps associated with the plan have a status of planned or pending. Steps must either be completed, canceled, or declined.

# Add Info Source & Comments for Phone & Email in Constituent Batch

The **Info source** and **Info source comments** fields for Phone Numbers and Email Addresses are now available to add to a constituent batch. Update your constituent batch template to include the Info source and Info source comments fields through the **Customize fields** options.



## CRM session duration extended to 90 minutes

When a user is logged in to **Blackbaud CRM** using **Blackbaud ID (BBID)** credentials, the session will end and the user will be logged out after 90 minutes of inactivity. This will be standard for any session logged in with BBID regardless of System Administrator status, and users will no longer be able to customize the inactivity logout time using web.config.

The session length is now based on inactivity across all BBID logins for the user, including in other Blackbaud applications. The 90-minute session length is the standard duration for BBID, and any changes to the BBID session length in the future will apply to all Blackbaud applications using BBID.

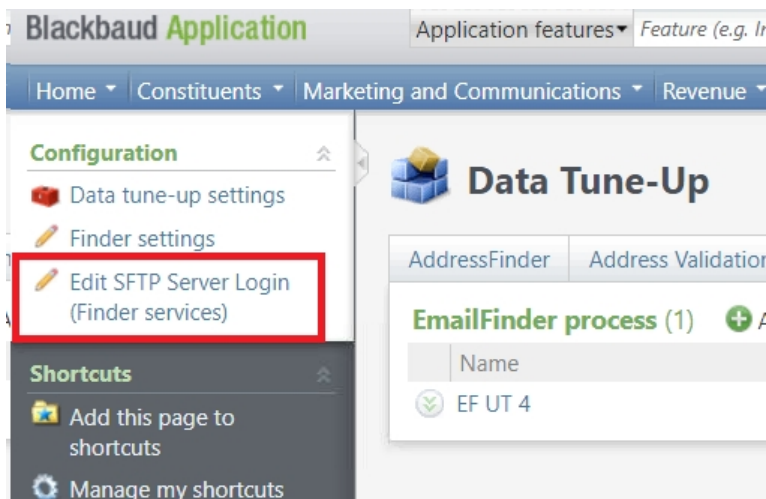
To learn more, please review Knowledgebase Article 68158: [How to manage timeout settings in CRM.](#)

## Enhanced SFTP security for PeopleFinder, PhoneFinder, and EmailFinder

For clients using the **PeopleFinder**, **PhoneFinder**, and **EmailFinder** data services, we have updated how and where your files are processed. This is part of our ongoing effort to improve security.

After downloading the Service Pack, affected clients will need to re-enter their Blackbaud SFTP login information by following these steps:

1. Select **Administration**, then **Data tune-up**.
2. Under the **Configuration**, select **Edit SFTP Server Login (Finder services)**.



3. You will be prompted to enter a **Username** and **Password**. Enter your current Blackbaud SFTP

credentials, then **Save**.

## Service Pack 35

These features were introduced in Service Pack 35 after the original **CRM 4.0** release.

## Accept payments via PayPal and Venmo

In **Blackbaud CRM**, *PayPal* and *Venmo* are now available as **Payment Methods** for use with these **Revenue** and **Application** types:

- **Donation**
- **Pledge Payment**
- **Recurring Gift Payment**
- **Event Registrations**
- **Membership Dues**
- **Grant Award**
- **Matching Gift Claim**
- **Auction Purchase**
- **Donor Challenge Claim**
- **Other**

These new payment methods are available in one-off **Payment Forms**, **Enhanced Revenue**, **Membership Dues**, and **Revenue Update** batch types.

To ease reconciliation, review the associated **Reference Date** and **Reference Number** fields.

**PayPal** and **Venmo** aren't available as payment method types for **Treasury Office Deposits** or **Miscellaneous Payments**.

Before **PayPal** and **Venmo** can be used as a payment method on transactions, a user with **General Ledger** access must define the necessary transaction mappings for the new payment methods.

**Note:** **PayPal** and **Venmo** transactions are processed via their Vendor portals. They aren't automatically processed within **Blackbaud CRM**.

The image shows two screenshots of the Blackbaud CRM transaction entry form. Both screenshots have three tabs: 'Payment information' (selected), 'Marketing', and 'Transaction details'.

**Top Screenshot (PayPal):**

- Payment method: PayPal (dropdown menu)
- Reference: [empty text box]
- Reference number: 352197564387634
- Total benefit amount: \$0.00
- Reference date: 03/03/2023
- Receipt amount: \$0.00
- ☐ Do not receipt
- ☐ Do not acknowledge

**Bottom Screenshot (Venmo):**

- Payment method: Venmo (dropdown menu)
- Reference: [empty text box]
- Reference number: 6286486636
- Total benefit amount: \$0.00
- Reference date: 03/03/2023
- Receipt amount: \$0.00
- ☐ Do not receipt
- ☐ Do not acknowledge

## Recognize Global Privacy Control (GPC)

**Blackbaud Internet Solutions** (BBIS) can now recognize **Global Privacy Control** from a user's internet browser configuration and application site.

Use this information to comply with US privacy laws.

Use the new option for the **CRM Solicit Code** to indicate that a constituent has their **GPC** preference set to true.

1. Go to **Sites & Settings**.
2. Select **Parent Site**.
3. Select **Settings**.
4. Select **General Settings**.
5. Find the new section called **General Privacy Control Solicit Code Mapping**.
6. Select which **Solicit Code** in **Blackbaud CRM** should correspond to having **GPC Enabled**.

**General Privacy Control Solicit Code Mapping**

Solicit Code:

GPC Solicit Code



Map to the Solicit Code in **Blackbaud CRM** that is used to indicate a website user has their Global Privacy Control preferences set to true in their browser.

Use the **Blackbaud CRM Consent Search** to find and select the standard **Solicit Code** you wish to use.

**Tip:** We recommend creating a **Solicit Code** in **Blackbaud CRM** such as "GPC Enabled" which makes it easy to distinguish on records.

**Blackbaud CRM Consent Search**

Find solicit codes or consent solicit codes from Blackbaud CRM that meet these criteria.

Type:

Name:

Site:

Page 1 of 1

	Name	Type	Channel	Site
<input type="button" value="Select"/>	Do not email	Solicit code	None	All sites
<input type="button" value="Select"/>	GPC Solicit Code	Solicit code	None	All sites

How **GPC Solicit Codes** are added to a user's record varies:

- If a **BBIS** user is already linked to a constituent in **Blackbaud CRM**, the **GPC Solicit Code** is automatically added to their constituent record when they log into BBIS. The Start Date for the **GPC Solicit Code** is the date they logged in, which enabled the GPC signal to be captured.
- When a new user registers, the mapped **GPC Solicit Code** is used in the corresponding **Constituent Update Batch** that's created. When the batch is committed, is **GPC Solicit Code** is added to the user's constituent record in **Blackbaud CRM**.
- If a user only uses the Website (BBIS) and isn't linked to a constituent record in **Blackbaud CRM**, then the **GPC Solicit Code** is added to the user's constituent record in **Blackbaud CRM** after they make a transaction via the appropriate transactional batch type.
- If an Anonymous (not logged in) user makes a transaction that leads to the creation of or matches to a constituent record, then the mapped **GPC Solicit Code** is added to the user's constituent record in **Blackbaud CRM** via the appropriate transactional batch type.

The **User** grid in **BBIS** now indicates when **GPC** is **Enabled**. You can also **Filter** based on the values in this new field. Select the checkbox above the grid for **GPC Enabled** to only show "Yes" results."

**Users**

Use this screen to add user accounts *only* for users who have administrator roles. You can also edit and delete user accounts, and assign users to roles.

Filter by first name:  Filter by surname:  Filter by login:  Filter by Email:  Filter by role:  Filter by back office link:  ☐ Deleted ☐ Supervisor ☐ GPC enabled

Action	First name	Surname	Username	Email address	Last login	GPC enabled
	org	const	const	org@const.com	30/10/2020 14:28:08	
	CRM_FIRST	crm_only_LAST	n10001450	piyushkumar.runme.0.him@previews.emailonacid.com		
	acid	de	acid	NitishGupta.runme.raj@previews.emailonacid.com		No
	direct	debit	direct_debit	piyushkumar.runme.0.him@previews.emailonacid.com	31/05/2023 17:18:40	Yes



- For **Website** users, the **GPC Enabled** field indicates **No** until that user logs into **BBIS** from a browser which has **GPC Enabled**. After they login, the **GPC** is captured and the value is updated to **Yes** (true).
- For **CRM** linked users, the **GPC Enabled** field remain blank as this data is stored in **Blackbaud CRM**.

**Note:** A back end indicator records the **GPC** signal state and prevents the **GPC Solicit Code** from being added again onto a constituent who already has it recorded, where the **Blackbaud Internet Solutions** user is logged in and is already linked with a **CRM Constituent**.

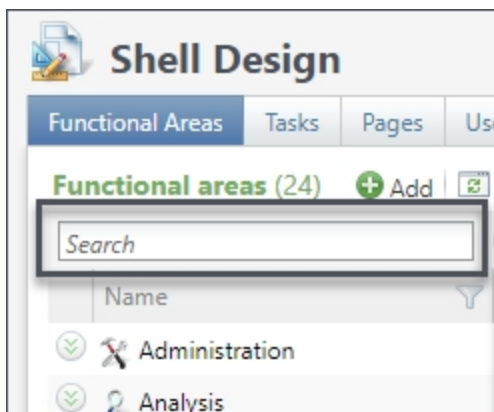
**Tip:** For more information, visit [Blackbaud's Privacy Resource Center](#).

## Shell Design: Search, Filter, and Choose Columns to Show

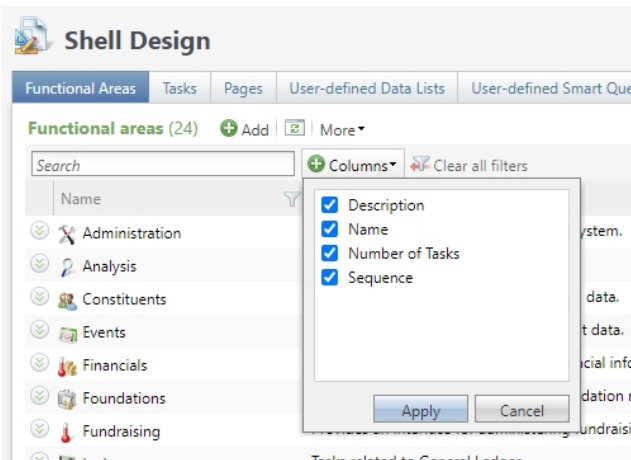
We've made a number of enhancements to improve the usability of the **Shell Design** page.

On the **Functional Areas** tab, you can now:

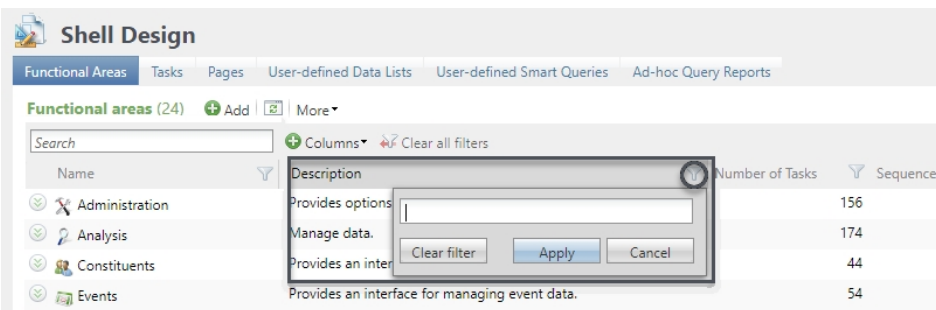
- **Search,**



- select + **Columns** to choose which columns to show,

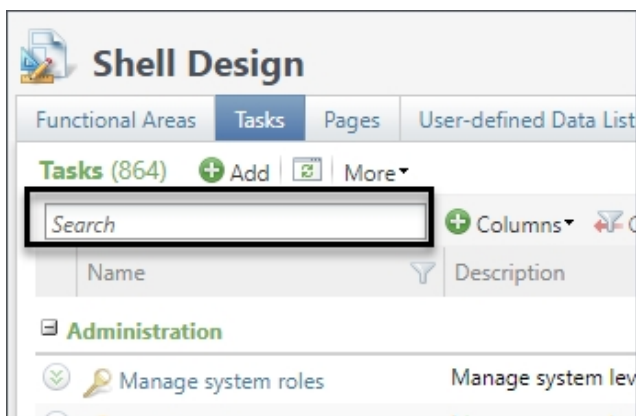


- **Filter** based on column data using the option in the column header.



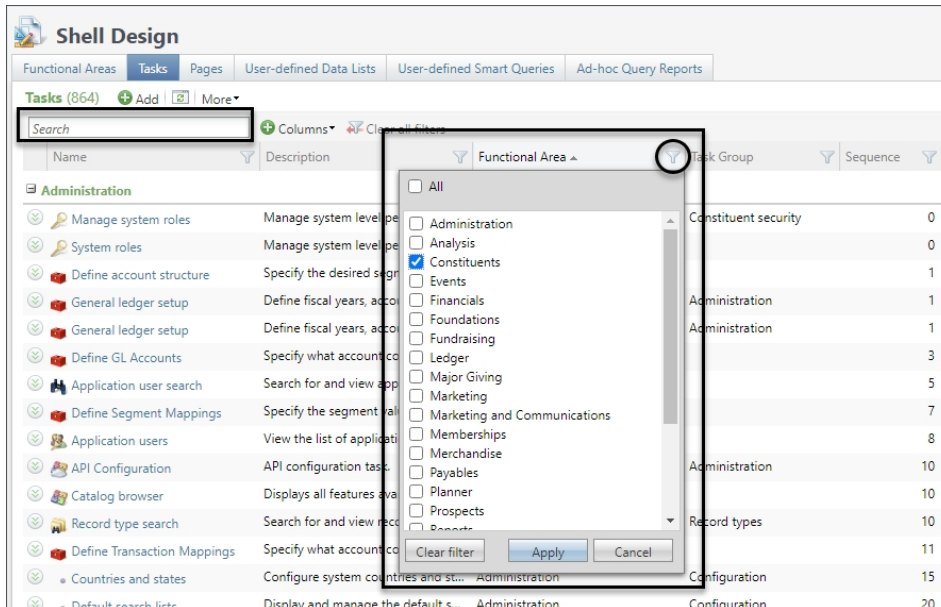
On the **Tasks** tab, you can now:

- **Search,**



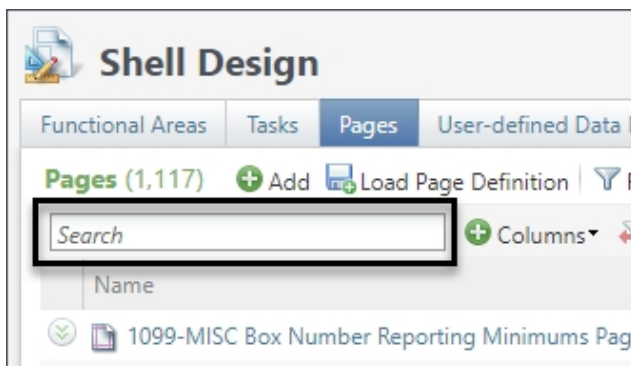
- select + **Columns** to choose which columns to show,

- **Filter** based on column data using the option in the column header.

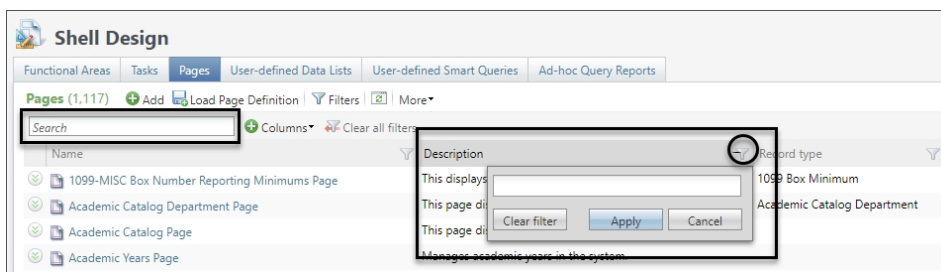


On the **Pages** tab, you can now:

- **Search,**

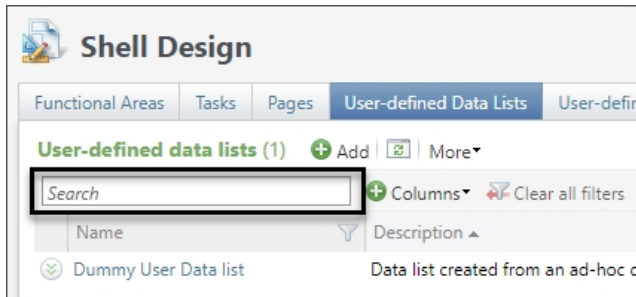


- select + **Columns** to choose which columns to show,
- **Filter** based on column data using the option in the column header.

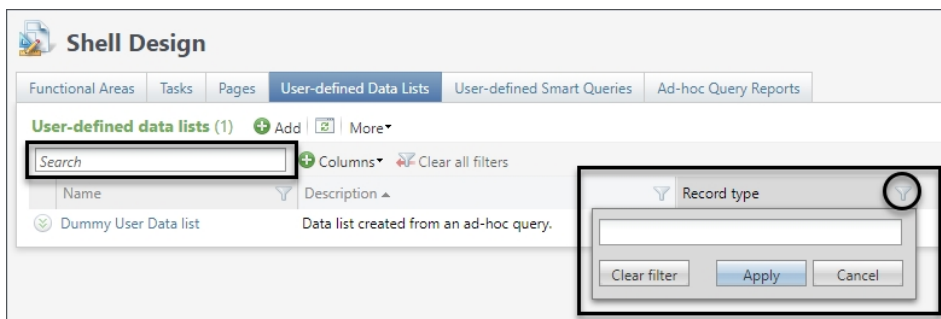


On the **User-defined Data Lists** tab, you can now:

- **Search,**

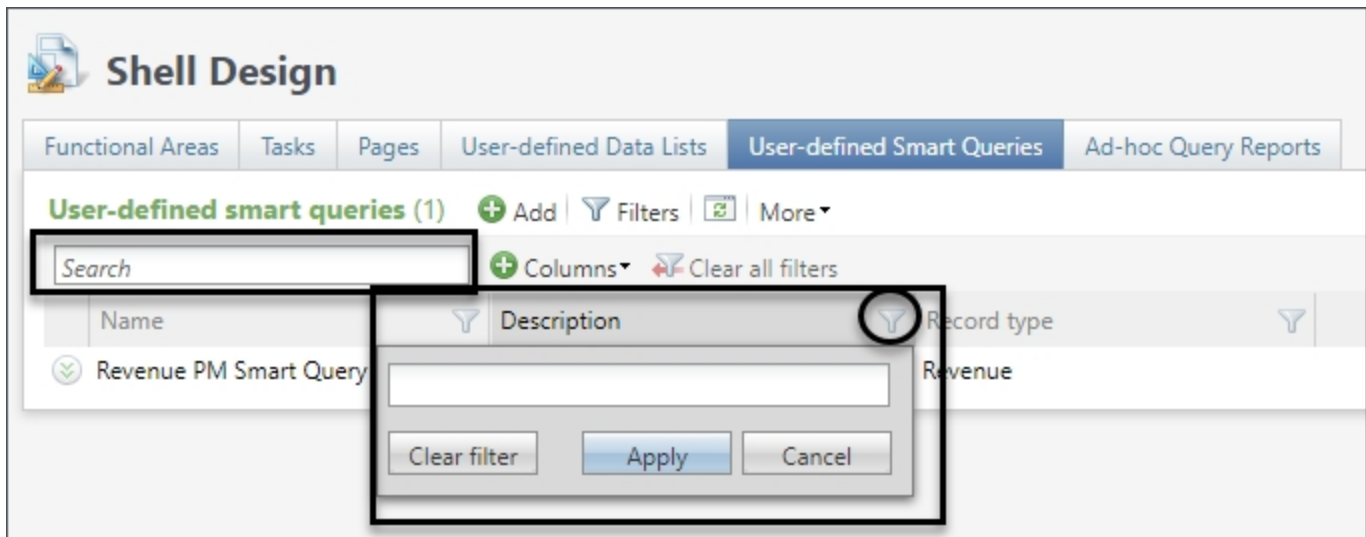


- select + **Columns** to choose which columns to show,
- **Filter** based on column data using the option in the column header.



On the **User-defined Smart Queries** tab, you can now:

- **Search,**
- select + **Columns** to choose which columns to show,
- **Filter** based on column data using the option in the column header.



On the **Ad-hoc Query Reports** tab, you can now **Filter** based on **Name** and **Description**.

The screenshot shows the 'Shell Design' application interface. At the top, there are tabs for 'Functional Areas', 'Tasks', 'Pages', 'User-defined Data Lists', 'User-defined Smart Queries', and 'Ad-hoc Query Reports'. The 'Ad-hoc Query Reports' tab is selected. Below the tabs, there is a section for 'Ad-hoc query reports (1)' with a '+ Add' button, a 'Filters' icon, and a 'More' dropdown. A yellow box highlights the 'Name' and 'Description' input fields, along with 'Apply' and 'Reset' buttons. Below this, a table shows a single entry: 'Adhoc Constituent grouping' with the description 'Report generated from an ad-hoc query.'

## Configure Site Translations for Fundraiser Performance Management

In **Fundraiser Performance Management (FPM)**, the **School/Unit Code** field can have values with a maximum of 20 characters. This causes **SiteIDs** from **Blackbaud CRM** to be truncated when they exceed this limit.

Now, from the **Configurations** page in **FPM**, you can configure **Site Translations** to map long **SiteIDs** to shorter **School/Unit Codes**.

When you run the **Contact Report Import**, the import now checks for **School/Unit Codes** which are mapped to **SiteIDs**. If there isn't a mapping, then import checks for **School/Unit Code Descriptions** that match **Site Short Name**.

This update reduces exceptions and errors with the **Contact Report Import**.

To learn more, visit:

- [Installation and Upgrade Guide for FPM for Blackbaud CRM](#)
- [User Guide for FPM for Blackbaud CRM](#)
- [Installation and Upgrade Guide for Blackbaud Luminate Online to CRM Connector](#)
- [User Guide for FPM for Blackbaud Luminate Online to CRM Connector](#)

## SKY API for On Premise

SKY API is now accessible to on premise customers.

To enable it, on premise customers must contact Blackbaud Customer Support to complete a one-time connection process.

**Note:** Customers hosted by Blackbaud have access to SKY API automatically enabled with this service pack and thus don't need to take additional action to access it.

The API is a modern, open, industry-standard application programming interface which you can use to develop robust applications and extensions. Use it to access data and functionality as an enterprise-level organization.

To learn more, visit the:

- [SKY API Developer Resources for Blackbaud CRM](#) ,
- [Support Changelog for SKY API for Blackbaud CRM](#),
- [How to Enable SKY API for Blackbaud CRM On-Premise Environments](#).

## Enable Sky API for On-Premise Environments

Before you begin, complete these prerequisites and review these known limitations:

- Be on Service Pack 35 or later.
- Obtain a URL to your **Blackbaud CRM** installation that is accessible from the internet.
  - Redirects and Virtual Private Networks (VPNs) are not currently supported.
- **SKY API** requests don't come from a set IP range. **SKY API** doesn't support using an allow list (white list) for IP addresses.
- Confirm you can make a Simple Object Access Protocol (SOAP) request to **Blackbaud CRM**.
  - Review the [Code Table Example](#) from the **Infinity Development Guide**.
  - Alternatively, use [Postman](#) or a similar tool to create web requests to specific endpoints.

After you complete the prerequisites, you're ready to enable **SKY API** for your on-premise environment. To do so:

1. [Create a case](#) with *Blackbaud Support*.
  - Include direct links to each **BLACKBAUD CRM** environment which you want to enable **SKY API**.  
Use this format:  
`https://yoururl.com/applicationroot/webui/webshellpage.aspx?databasename=dbname`
  - For each URL, specify the type of environment (production, staging, test, etc.).
2. Sign up for a [Blackbaud ID account](#).
3. Create a [SKY Developer account](#).
4. [Enable SKY API](#) in your **Blackbaud CRM**.
5. [Link your Blackbaud ID user](#) to your **Blackbaud CRM** application user.
6. After your support case is complete, you'll receive a response that includes scripts specific to each environment requested.

