Web Transactions Guide

1/12/2017 Blackbaud CRM 4.0 Web Transactions US

WebTransactions-2016

Contents

Web: The Big Picture

You can integrate ***Blackbaud CRM*** with ***Blackbaud Internet Solutions*** to transfer data between the program and your website. For example, you can download constituent profile and donation transactions from the site into constituent and revenue records. Also, when a constituent is a member on your site, you can view the constituent’s site activity on the constituent record.

Full Circle View

Before you begin to process transactions, you must complete the integration options and tasks so ***Blackbaud Internet Solutions*** can communicate with ***Blackbaud CRM***. Next, configure batch templates to store transaction data website users submit on your website. After users submit the data, download it into batches and add the information to your database.

1. Integrate and Configure

To integrate ***Blackbaud CRM*** and ***Blackbaud Internet Solutions***, enter the web address to the administrator's login page on your website, establish user mapping, and map tables between the two programs. For more information, refer to Web Configuration and Tasks on page 10 and Web Tasks on page 14.

Tip: The system administrator at your organization typically grants rights to a select group of users for these configuration and task options.

2. Transactions on Your Website

Website users use the parts on your website to process data and transactions. For example, the User Login part submits registration transactions into a Constituent Update Batch and the Donation Form part submits donation transactions into an Enhanced Revenue Batch. For information about ***Blackbaud Internet Solutions*** and all of the parts available for a website, refer to the Blackbaud Internet Solutions user guides.

3. Download Website Transactions

From the Web Transactions page, on the Transactions tab, the **Pending transactions** grid displays the number of pending transactions from your website that are ready for you to download into a batch.

For more information about this grid and how to download transactions, refer to Download Web Transactions on page 23.

Note: Before you download website transactions, you can create web batch templates and you can create batch assignments. For details, refer to the *Batch and Import Guide* and Batch Assignment Settings Tab on page 28.

4. Process and Commit Blackbaud Internet Solution Batches

From the Web Transactions page, on the Transactions tab, the **Uncommitted batches** grid displays information about the batches you download from the **Pending transactions** grid, but have not committed to ***Blackbaud CRM*** records. You open and edit these batches to view data from the website so you can decide whether or not to update the information on the existing record. For information about data in uncommitted batches from your website, refer to Uncommitted Web Transactions on page 25 and Web Transaction Batch Types on page 37.

After you commit the batch, you can view records to confirm data processed successfully to the corresponding records.

Workflow - Web

Life of a Web Transaction Batch

Regardless of the web transaction batch type you create, the process or "life" of a batch includes similar steps. Use the following to review descriptions for each step and how they relate to each other.

1. Configure web batch template

Before you download and enter data into a web batch, you can create a web batch template in ***Blackbaud CRM*** to select the batch type, numbering scheme, and workflow. Batch templates define basic information about a batch, such as fields and default values for the fields. Once you specify a template and create a batch, the specified fields appear on the batch data entry screen so you can quickly enter information. For details, refer to the *Batch and Import Guide*.

To help manage transactions that you download from your website, you can also create batch assignments to group transactions together and assign batch ownership. For example, you can create a batch assignment to group all donation transactions and assign them to Mark Adamson for processing. For details, refer to Batch Assignment Settings Tab on page 28.

Refer to this list for information about the various ***Blackbaud Internet Solutions*** transactions and the ***Blackbaud CRM*** web batch templates used to process them.

- Website user signup transactions use the batch template Constituent Update Batch on page 39.
- Donation transactions use the batch template Enhanced Revenue Batch on page 44.
- Profile update transactions use the batch template BBIS Profile Update Transaction Batch on page 48
- Event registration transactions use the batch template BBIS Event Registration Transaction Batch on page 55.
- Membership transactions use the batch template Membership Dues Batch on page 63.

2. Download web transactions

Once you create your web batch templates, you can download transactions that website users submitted on your ***Blackbaud Internet Solutions*** site into your web batch templates. For details, refer to Download Web Transactions on page 23.

3. Edit and update web uncommitted batch

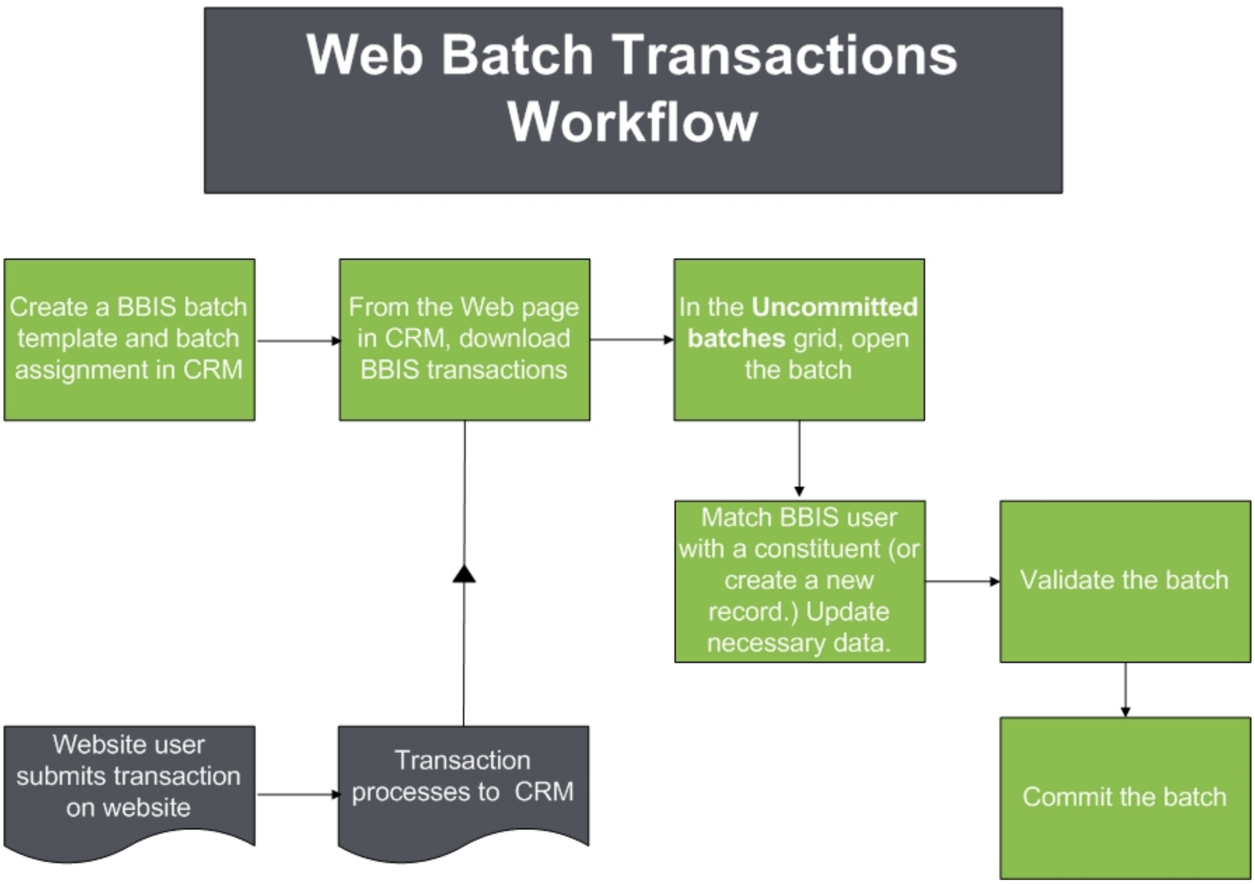
Next, you edit and update a web uncommitted batch. When you enter data into a batch, the batch is considered uncommitted (not yet applied or saved to your database.) When a batch is uncommitted, its data has not yet created or updated records in ***Blackbaud CRM***. You can continue to edit the data entered in an uncommitted batch or move an uncommitted batch through its workflow. For details, refer to Uncommitted Web Transactions on page 25 andWeb Transaction Batch Types on page 37.

4. Match website users with constituents

When you update data in an uncommitted batch, you match website users to constituent records, or you can select to add a new record for the site user. When you match users in a Constituent Update Batch and Enhanced Revenue Batch, ***Blackbaud CRM*** uses constituent update rules to identify possible matches. When you match users in a BBIS Profile Update Transaction Batch, BBIS Event Registration Transaction Batch, and Membership Dues Batch, ***Blackbaud CRM*** uses the fields you select on the Auto-match tab of the Configure integration task to identify possible matches. For details, refer to the *Duplicate Constituents and Merge Tasks Guide* and Configure integration - Auto-match tab on page 18.

5. Validate and commit the web batch

Once data entry is complete, you can validate and commit the web batch. ***Blackbaud CRM*** uses the data in the batch to create or update records in your database. For details, refer to the *Batch and Import Guide*.

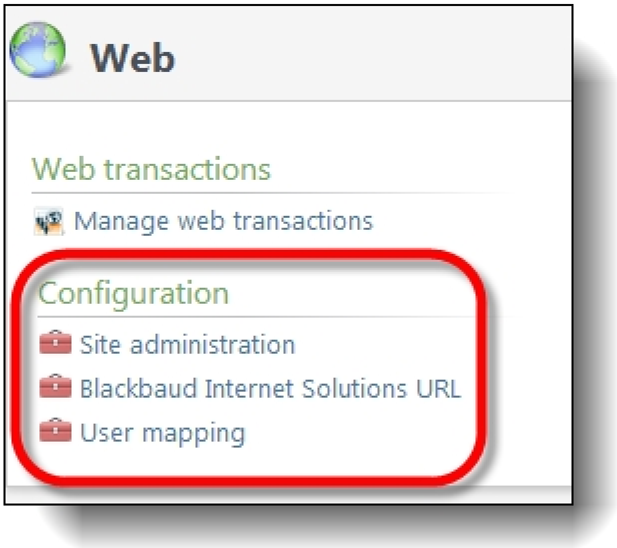


Web Configuration and Tasks

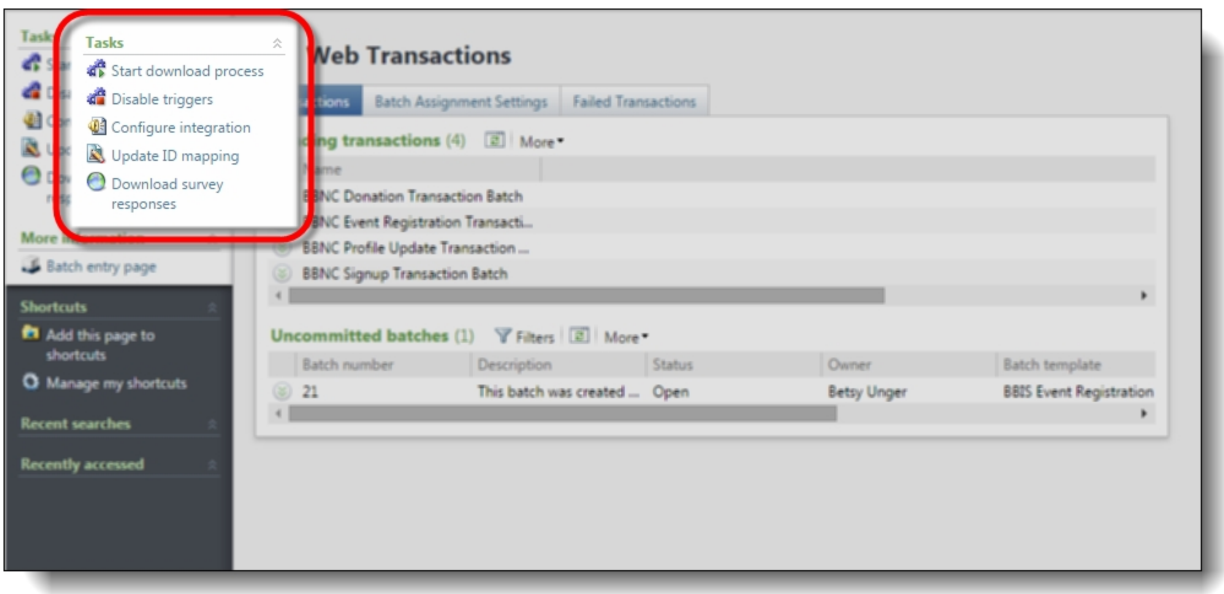
From *Web*, you can access the administrative configuration and task tools to manage your organization's website and download online transactions to your database. You must establish these options before you can download transactions from the website.

Tip: The system administrator at your organization typically grants rights to a select group of users for these configuration and task options.

On the Web page, under **Configuration**, you integrate ***Blackbaud CRM*** with the ***Blackbaud Internet Solutions*** website and map application users to website users.



Also from the Web page, you access the Web Transactions page to complete the integration tasks to allow the programs to share information. For example, you can enable triggers to ensure a smooth integration and you can update table mapping so changes in your database are communicated between the two programs. You must also specify the data types assigned to information downloaded from the website.

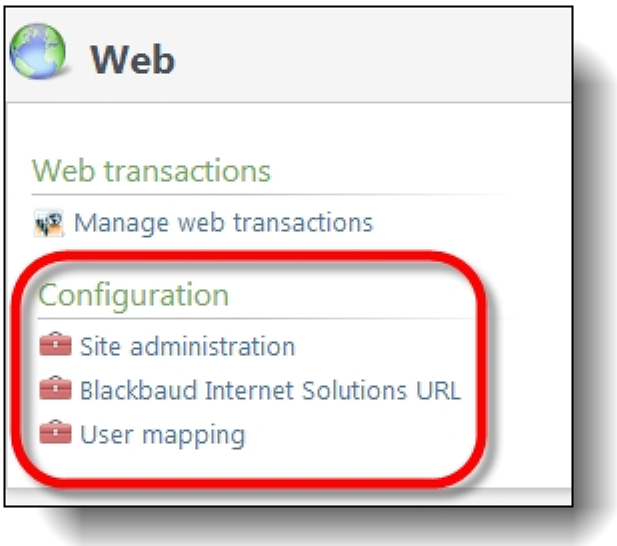


Note: To verify successful integration between the programs, make sure you can open the ***Blackbaud Internet Solutions*** administrative options from the Web page. To do this, under **Configuration**, click **Site administration**.

Web Configuration

From *Web*, under **Configuration**, you can access your website's administrative tools to create web pages, generate and send email to individuals or groups, and define roles and set security for the site.

Tip: The system administrator at your organization typically grants rights to a select group of users for these configuration options.



From this area you also manage additional configuration options such as selecting the ***Blackbaud CRM*** URL so ***Blackbaud Internet Solutions*** integrates with the website and mapping application users to website users.

Site Administration

To access the ***Blackbaud Internet Solutions*** administrative tools for your website from the Web page, under **Configuration**, click **Site administration**. The program appears. Use these tools to create web pages with multiple layers of layout, template, and page design. You can also generate and send email to individuals and groups, define user roles and set security for the site, and track statistics about website usage. For information about ***Blackbaud Internet Solutions*** and all of the tools available for a website, refer to the Blackbaud Internet Solutions user guides.

Blackbaud Internet Solutions URL

To download web transactions, you must enter the web address to the administrator’s login page on your website.

Select the Blackbaud Internet Solutions URL

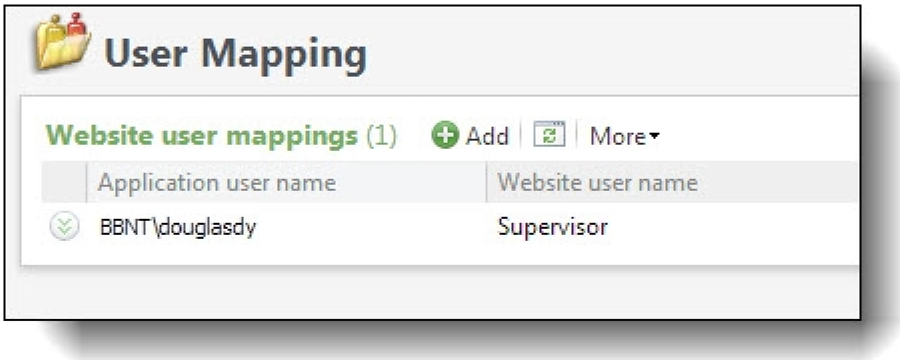
1. On the Web page, under **Configuration**, click **Blackbaud Internet Solutions URL**. The Website URL screen appears.
2. In the **Website URL** field, enter the complete web address to the administrator's login page for your organization's website.

Note: If Secured Sockets Layer (SSL) is required to access the administration side of your website, make sure "https://" is at the beginning of the address in the **Website URL** field.

3. Click **Save**. You return to the Web page.

User Mapping

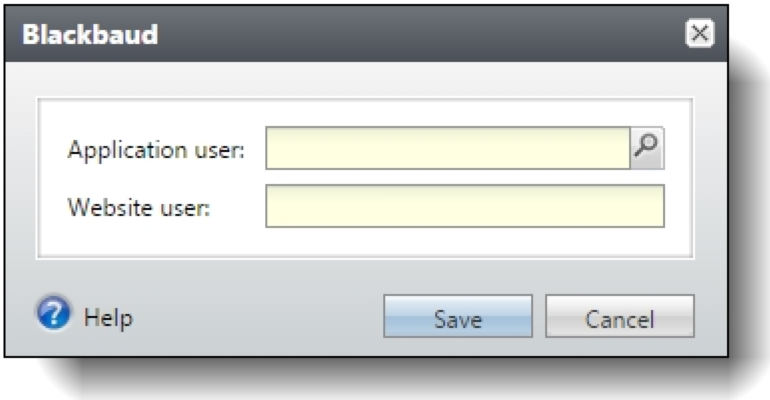
Before application users can manage your organization's website through *Web*, you must map user records in ***Blackbaud CRM*** to user records on the website. To access the User Mapping page on the Web page, under **Configuration**, click **User mapping**. The User Mapping page appears and displays the user names for program users whom you map to user records on the website.



From the **Website user mappings** grid, you can add, edit, and delete user mappings. To update the grid, click **Refresh List**.

Add a User Mapping

To allow a user in the program to manage the organization's website from *Web*, map the user's record to a user record on the website. To do this, on the User Mapping page, click **Add**. A screen appears.



In the **Application user** field, select the user name of the program user. In the **Website user** field, enter the user name on the website. To return to the User Mapping page, click **Save**.

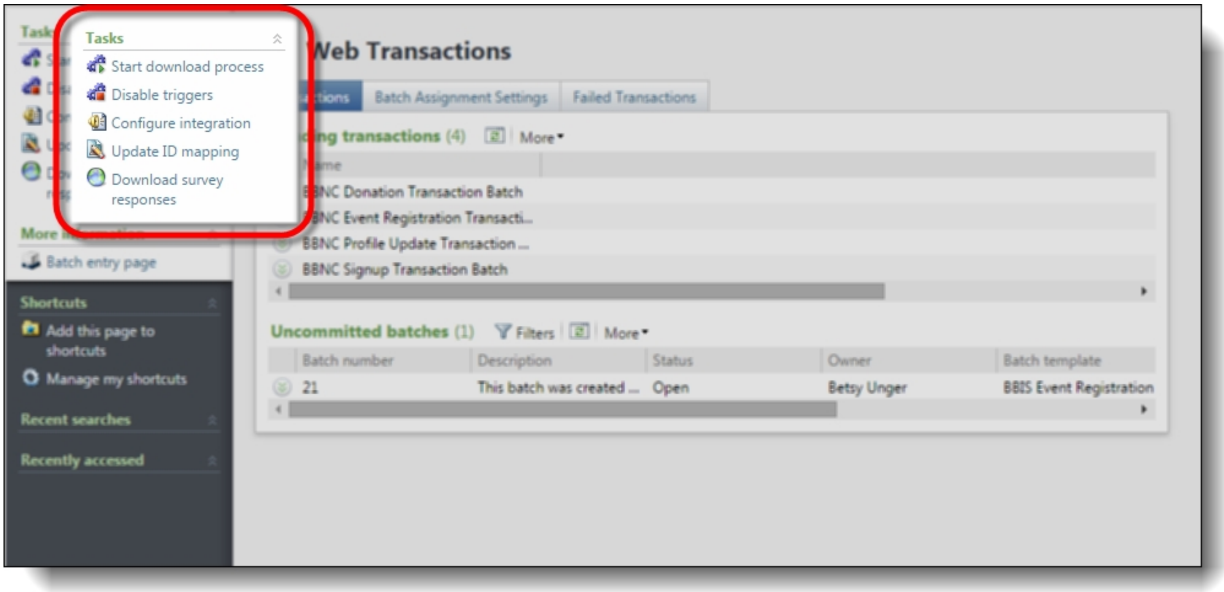
Note: When you edit user mapping, the **Application user** field is disabled because you cannot edit the ***Blackbaud CRM*** user name mapped to the website. To edit the application user name, delete the user mapping and add a new one.

Web Tasks

Before you download transactions from the website, you must complete integration tasks to allow the programs to share information. You can enable triggers and update table mapping to make sure changes in your database communicate between the two programs. You must also specify the data types assigned to information downloaded from the website.

Tip: The system administrator at your organization typically grants rights to a select group of users for these task options.

To access integration tasks from the Web page, select **Manage web transactions**. These options appear under **Tasks** on the Web Transactions page.



Stop and Start Automatic Downloads

You can start and stop the automatic download process as necessary for your web transactions. On the Web Transactions page, under **Tasks**, click **Stop download process** to stop automatic downloads of web transactions or **Start download process** to resume automatic downloads.

Note: To manually download web transactions when you stop the automatic process, select a transaction type under **Pending transactions** on the Web Transactions page and click **Download**.

Enable and Disable Triggers

To download transactions from your organization’s website, you must first enable triggers. When you enable triggers, changes to your database communicate between the two programs. To enable triggers on the Web Transactions page, under **Tasks**, click **Enable triggers**. When a confirmation message appears, click **Yes**.

You can also disable triggers. For example, when you update your database with major revisions you may want to disable the triggers to prevent communicating each change as it happens. To disable the triggers, under **Tasks**, click **Disable triggers**. When a confirmation message appears, click **Yes**.

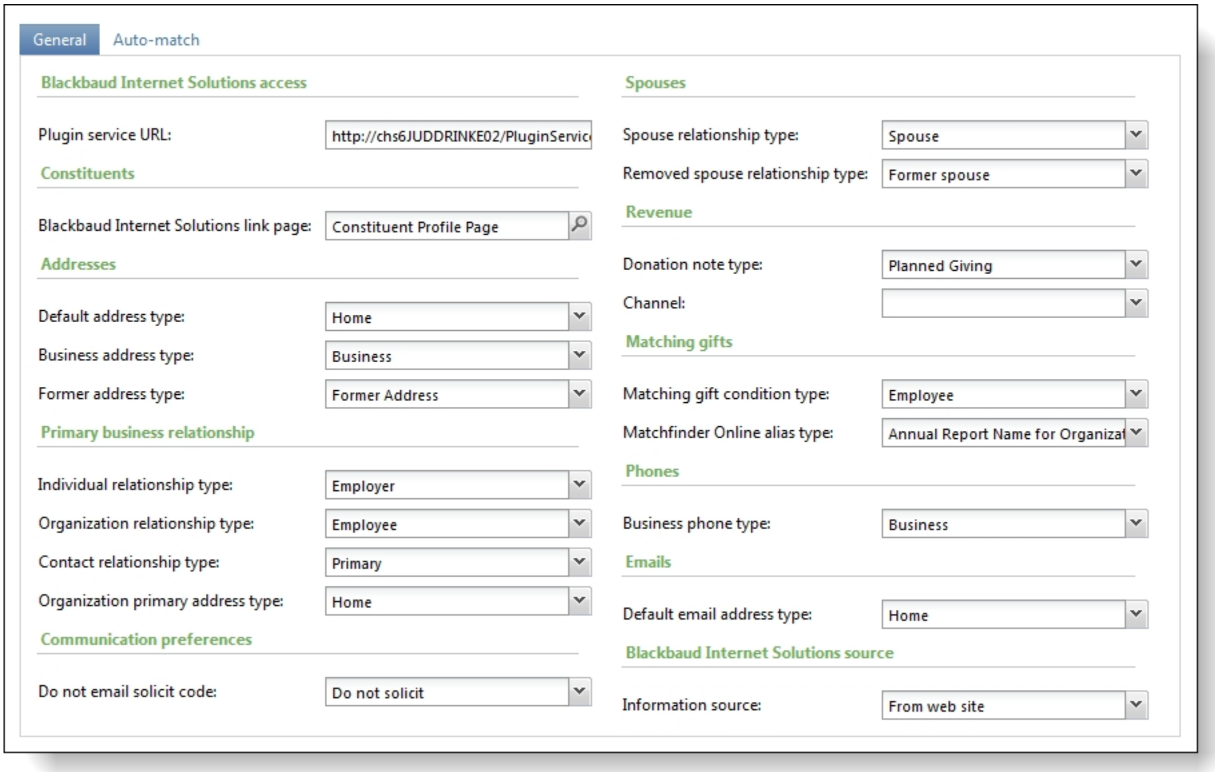
Warning: When triggers are disabled, users cannot download transactions from the website.

Configure Integration

Before you download transactions from your ***Blackbaud Internet Solutions*** website, you must specify the data types to assign to the information that you download.

Configure integration - General tab

1. On the Web Transactions page, under **Tasks**, click **Configure integration**. The Configure integration screen appears.



2. Under **Blackbaud Internet Solutions access**, enter the web address of your organization’s Blackbaud Internet Solutions plug-in web service in the **Plugin service URL** field.
3. Under **Constituents**, select a ***Blackbaud CRM*** constituent page in the **Blackbaud Internet Solutions link page** field. When you do this, a **Click here to view this constituent** icon appears for users mapped to ***Blackbaud CRM*** in the grid on the Users page in ***Blackbaud Internet Solutions***. You can click the icon in ***Blackbaud Internet Solutions*** to open a user’s constituent record in ***Blackbaud CRM***.
4. Under **Addresses**, select the address types to assign to default, business, and former address information downloaded with transactions.

   Tip: When you process transactions, you can select a different address type to assign to individual transactions. When you do this, the address type you select for the transaction overrides the default address type you select on this tab. For example, in the **Default address type** field, you select "Home." When you process a Constituent Update Batch, you assign the address type "Seasonal" to a sign up transaction. After you process the batch, "Seasonal" appears for the address type on the constituent record.

5. Under **Primary business relationship**, select the relationship and address types to assign to primary business relationships information downloaded with transactions.

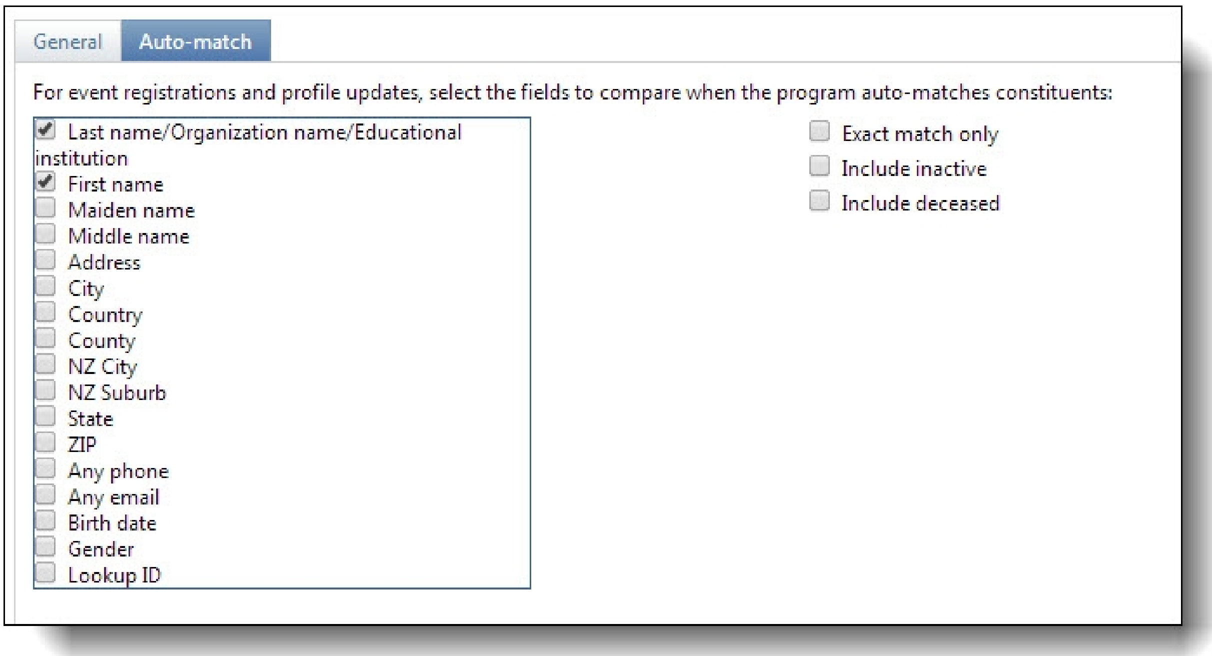
- In the **Organization relationship type**, **Individual relationship type**, and **Contact relationship type** fields, select the relationship types to assign to organizations, individuals, and contacts downloaded with primary business relationship information.
- In the **Organization primary address type** field, select the address type to assign to address information downloaded as primary business relationship information.

6. Under **Communication preferences**, select the solicit code to assign to constituents who have opted out of email communication.
7. Under **Spouses**, select the relationship types to assign to spouse information downloaded with transactions.
   - In the **Spouse relationship type** field, select the relationship type to assign to new or current spouse information.
   - In the **Removed spouse relationship type** field, select the relationship type to assign to changed or removed information. For example, a website user may select "Former spouse" on your profile update web page when he or she has been through a divorce.
8. Under **Revenue**, specify how to handle revenue information downloaded with transactions.
   - On the website, you can enable site users to enter comments when they make online donations. In the **Donation note type** field, select the note type to assign to all comments downloaded with donation transactions.
   - In the **Channel** field, select the channel to assign for all donations and event registration payments downloaded from your organization’s website.
9. Under **Matching gifts**, specify how to handle matching gift claim information downloaded with transactions.
   - In the **Matching gift condition type** field, select the matching gift condition type to assign to all matching gift claims downloaded with a transaction.
   - In the **MatchFinder Online alias type** field, select the alias type to assign to all *MatchFinder Online* company alias information downloaded with a transaction.
10. Under **Phones**, select the phone types to assign to all *MatchFinder Online* business phone numbers downloaded with transactions.
11. Under **Emails**, select the email address type to assign to email addresses downloaded with transactions.
12. Under **Blackbaud Internet Solutions source**, select a default information source to use when data from your website is used to create constituents or to create or update contact information. For example, use an information source like “Web update” to indicate that constituent or contact information was submitted through your website.
    - When constituents are created from data in web transactions, the information source appears in the **Constituent source** field on the Origin tab of the Constituent History page.
    - When addresses, phone numbers, and email addresses are created or updated based on data in web transactions, the information source appears in the **Information source** field on the Contact tab of the constituent record.
13. Click **Save**. You return to the Web Transactions page.

Configure integration - Auto-match tab

Note: The fields you select on the Auto-match tab apply to the BBIS Profile Update Transaction Batch, BBIS Event Registration Transaction Batch, and Membership Dues batch types. The Constituent Update Batch and Enhanced Revenue Batch types use your organization's constituent update rules to identify possible matches. For information about constituent update rules, refer to the *Duplicate Constituents and Merge Tasks Guide*.

1. On the Web Transactions page, under **Tasks**, click **Configure integration**. The Configure integration screen appears.
2. To configure how the integration automatically matches downloaded website users to constituents, select the Auto-match tab.



3. In the box, select the checkboxes for the constituent information to use to automatically match downloaded users to constituents in your database.
4. Specify how to automatically match downloaded users to constituents.
   - To match a website user to a constituent when data matches your selected constituent fields, select **Exact match only**. For example, when a website user enters the first name "Matt" on your web page, ***Blackbaud CRM*** automatically matches the user to constituents with the first name "Matt" and "Matthew" because both of these names include the exact text the website user entered.
   - To include inactive constituents when the program automatically matches users, select **Include inactive**.

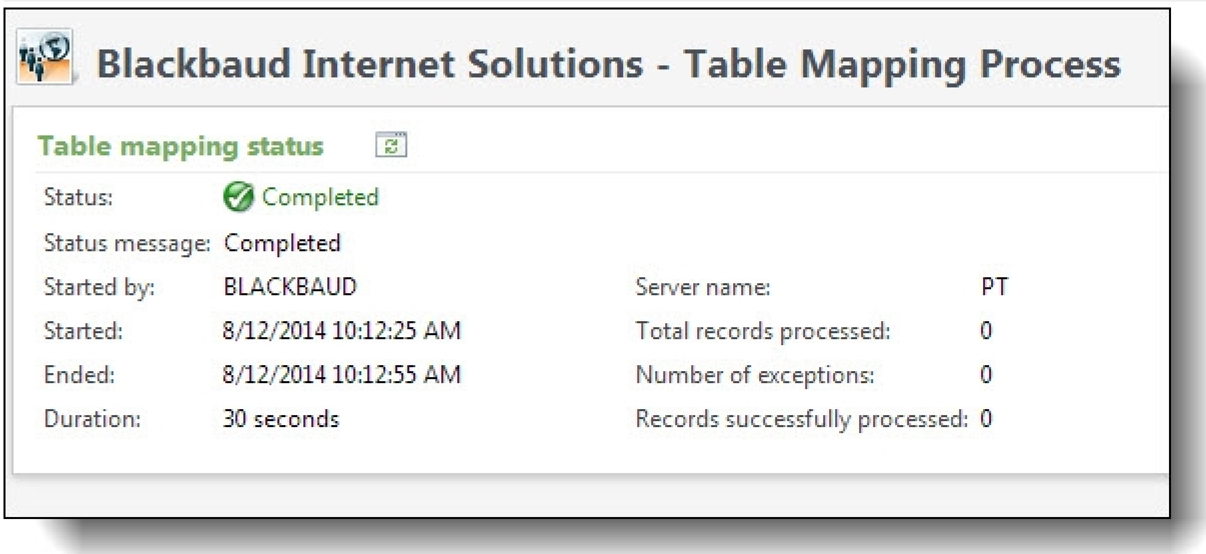
- To include deceased constituents when the program automatically matches users, select **Include deceased**.

5. Click **Save**. You return to the Web Transactions page.

Update ID Mapping

When you download information from your organization's website, the data maps to tables in your database. When you first configure the integration with the website, or after you change a data table in your database, you can update the table mapping so the information is immediately available on your website. To do this, on the Web Transactions page, under **Tasks**, click **Update ID mapping**. The program updates the mapping of the tables in the database. When the process completes, the Table Mapping Process status page appears.

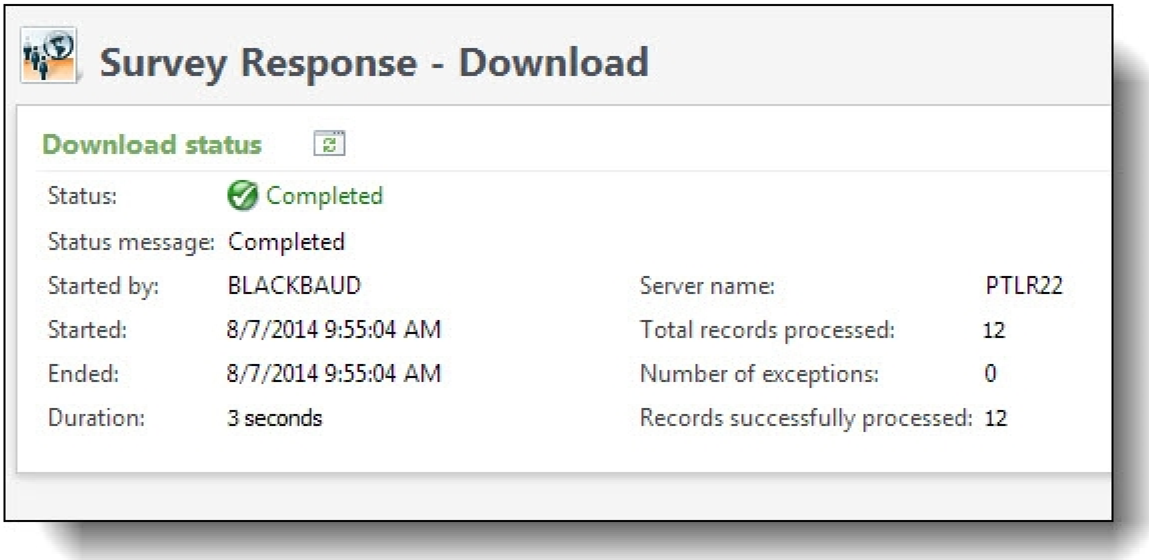
Tip: Consider running this task when you make donation-related table changes (for example, changes to appeals or designations) so the information is immediately available on your website. Otherwise, the tables update based on the ***Blackbaud CRM*** web service setting in ***Blackbaud Internet Solutions*** *Administration*. For more information, refer to the Blackbaud Internet Solutions Administration Guide.



Under **Table mapping status**, information about the instance of the process appears, such as whether the process completed, the start and end date and time of the process, the user who started the process, the server used to run the process, the total duration of the process, the total number of records processed, and how many records processed successfully and how many did not.

Download Survey Responses

When you design your website, you can create a Survey part to learn more information about your constituents and their interests. In ***Blackbaud CRM***, you download these responses to track the information on constituent records. You do not process survey responses in a batch. You download them from the **Download survey responses** task on the on the Web Transactions page. Under **Tasks**, when you click this option, the program downloads the survey responses from your website and displays the Survey Response Download process status page to track the progress of the download.



Note: You can also download survey responses from the Survey Response Download process status page. On the status page, under **Tasks**, click **Start process**. The program automatically starts the download process and updates the status page with information about the new instance of the process. To include the same constituents and responses included in the original download, you can reset the last run on date of the process. For information about how to reset the last run on date, refer to Reset the Last Run On Date of a Survey Response Download Process on page 20.

After you download survey responses, you can view the responses of a specific website user from the user's constituent record. On the constituent record, select the Documentation and Interactions tab and then select the Surveys tab. The survey information for the constituent appears. From this tab, you can view the surveys completed by the constituent and the responses entered for each. For information about downloaded survey responses and the Surveys page, refer to Surveys Page on page 73.

Note: When you administer your website, you can clear the responses from the Survey part. If you clear the responses from the Survey part, when you next download survey responses, the program automatically removes the survey and responses from the Surveys pages of your constituents.

Reset the Last Run On Date of a Survey Response Download Process

When you download survey responses from your website, the program automatically updates the records of the constituents who took the survey with a record of their participation in the survey and their respective responses. To include the same constituents and responses the next time you download survey responses, you can reset the date the process was last run from the Survey Response Download process status page of the most recent instance of the process.

On the Survey Response Download process status page, under **Tasks**, click **Reset last run on date**. At the message that appears to ask whether to reset the last run on date of the process, click **Yes**. You return to the Survey Response Download process status page.

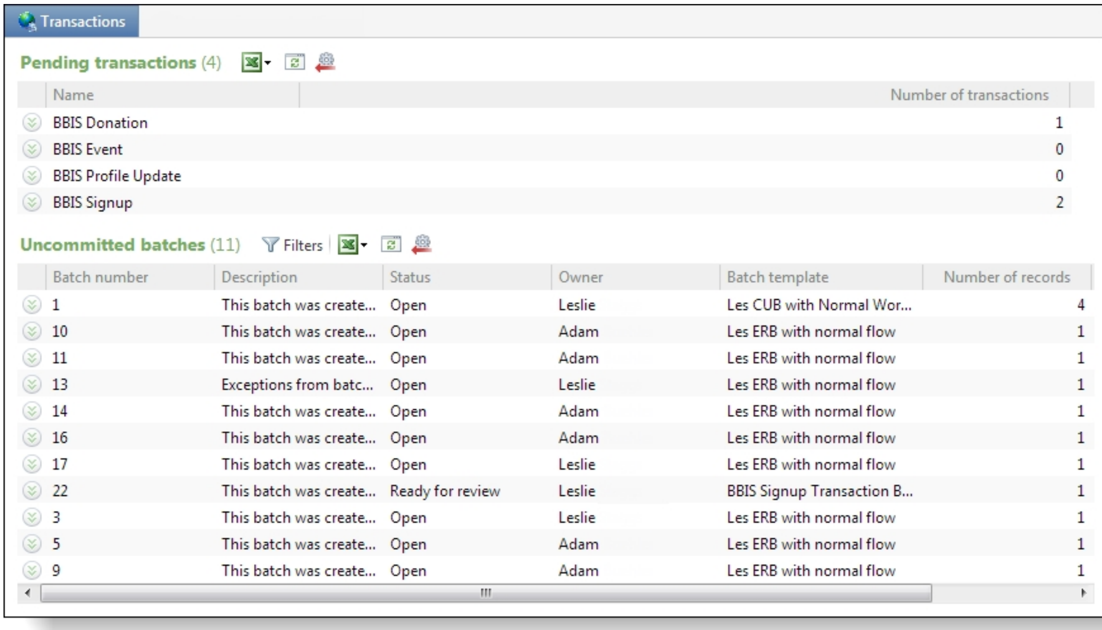
Web Transactions Page

On the Web Transactions page, you download and manage transactions from your website, manage batch assignments for the transactions that you download, and view failed transaction information. To access the page, go to *Web* and click **Manage web transactions**. The Web Transactions page appears. The tasks that you can perform on this page depend on your security rights.

Transactions Tab

The Transactions tab displays information about pending web transactions and uncommitted batches for ***Blackbaud Internet Solutions*** transactions.

Note: Before you can download data from your website, you must configure the integration with your ***Blackbaud Internet Solutions*** site. For information about how to configure the integration, including how to enable triggers, refer to Web Configuration and Tasks on page 10.



Name	Number of transactions
BBIS Donation	1
BBIS Event	0
BBIS Profile Update	0
BBIS Signup	2

Batch number	Description	Status	Owner	Batch template	Number of records
1	This batch was create...	Open	Leslie	Les CUB with Normal Wor...	4
10	This batch was create...	Open	Adam	Les ERB with normal flow	1
11	This batch was create...	Open	Adam	Les ERB with normal flow	1
13	Exceptions from batc...	Open	Leslie	Les ERB with normal flow	1
14	This batch was create...	Open	Adam	Les ERB with normal flow	1
16	This batch was create...	Open	Adam	Les ERB with normal flow	1
17	This batch was create...	Open	Leslie	Les ERB with normal flow	1
22	This batch was create...	Ready for review	Leslie	BBIS Signup Transaction B...	1
3	This batch was create...	Open	Leslie	Les ERB with normal flow	1
5	This batch was create...	Open	Adam	Les ERB with normal flow	1
9	This batch was create...	Open	Adam	Les ERB with normal flow	1

The **Pending transactions** grid displays information about pending ***Blackbaud Internet Solutions*** transactions. When you enable triggers, the grid tracks pending transactions for each batch assignment setting. Depending on your security rights and system role, you can download pending transactions into uncommitted batches. To make sure you have the most recent transactions from the website, click **Refresh**.

Tip: Before you download web transactions from your website, we recommend you first add batch assignment settings to determine how the program downloads transactions from ***Blackbaud Internet Solutions***. When you create a batch assignment setting, we also recommend that you create a batch assignment to select the batch template and batch owner for the setting. For more information, refer to Batch Assignment Settings Tab on page 28.

The **Uncommitted batches** grid displays information about uncommitted batches for ***Blackbaud Internet Solutions*** transactions. Depending on your security rights and system role, you can perform tasks to process batches. To update the grid, click **Refresh**.

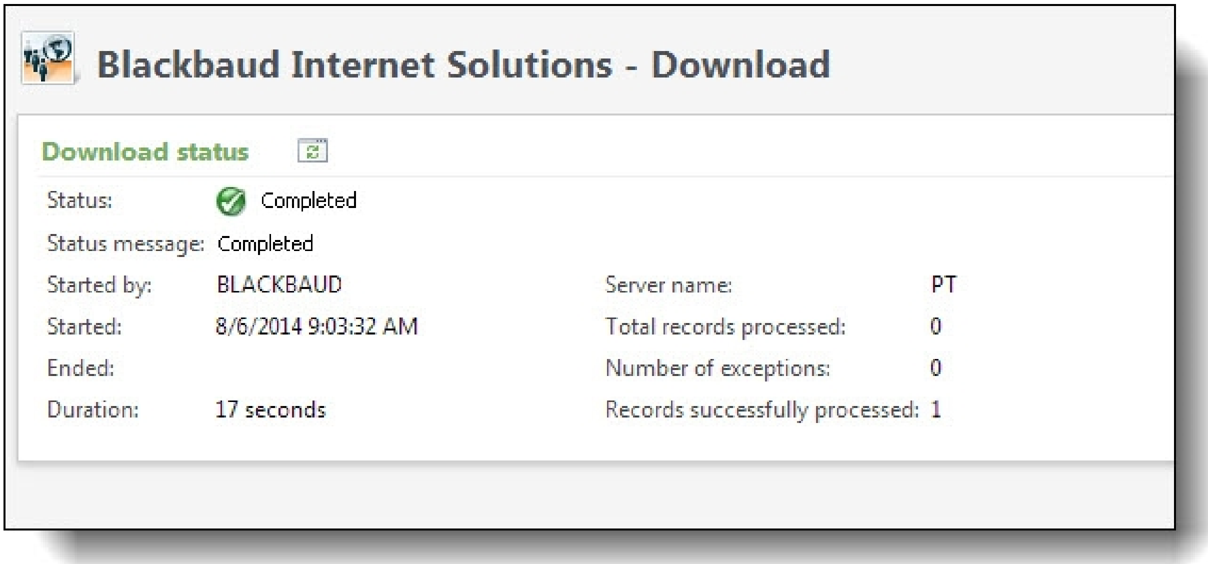
Download Web Transactions

On the Transactions tab, the **Pending transactions** grid displays the batch assignment settings for your web transactions and the number of pending transactions for each setting. You can select a batch assignment setting and click **Download** to download web transactions. For information about how to set up batch assignment settings, refer to Batch Assignment Settings Tab on page 28.

Tip: Before you download web transactions from your website, we recommend you first add batch assignment settings to determine how the program downloads transactions from ***Blackbaud Internet Solutions***. When you create a batch assignment setting, we also recommend that you create a batch assignment to select the batch template and batch owner for the setting. For more information, refer to Batch Assignment Settings Tab on page 28.

Download transactions from your website

1. From *Web*, click **Manage web transactions**. The Web Transactions page appears.
2. On the Transactions tab, click **Refresh** beside **Pending transactions** to make sure the number of pending transactions from your website are up to date.
3. Click the double arrows beside a batch to expand its row and then click **Download**. The program downloads pending transactions and the Blackbaud Internet Solutions Download process status page appears. For more information about this page, refer to Blackbaud Internet Solutions Download Process Status Page on page 25.

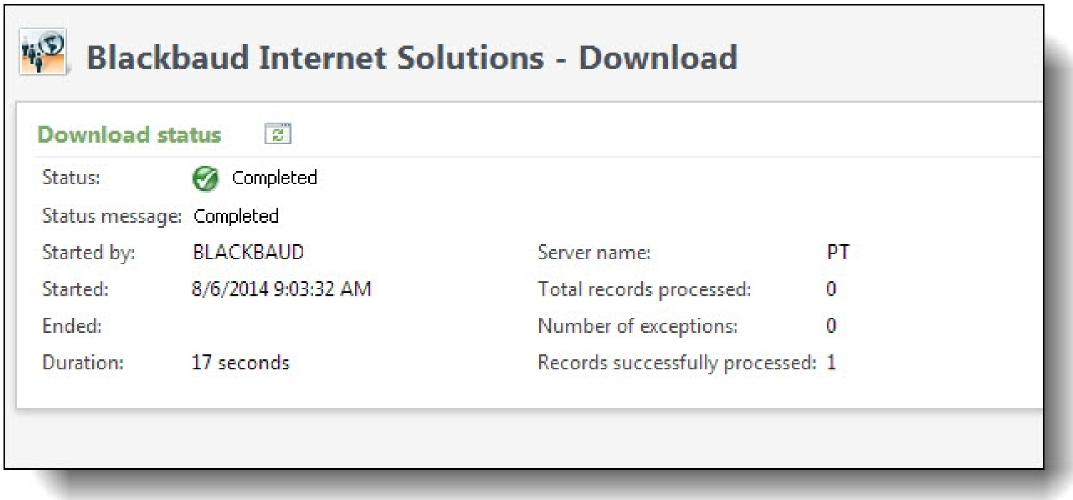


- On the Batch assignment settings tab, you select whether to download transactions to a single batch or to multiple batches with specified owners. For more information, refer to Add Batch Assignment Settings on page 29.
- In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the **Bill to** field marked as required.
- When a batch already exists in its initial state for a transaction type and owner, the program automatically downloads applicable transactions to that existing batch. Otherwise, it creates a batch for the transactions.
- After you download transactions from your website, you can edit uncommitted batches to update the data. For example, you can update the data or format it to meet your organization's data entry standards. On the batch data entry screen, each transaction has a separate row in the spreadsheet. For information about how to edit uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.

4. To return to the Web page after the download process, under **Tasks**, click **Blackbaud Internet Solutions transactions**.

Blackbaud Internet Solutions Download Process Status Page

Depending on your security rights and system role, you can download pending transactions from your website into uncommitted batches in the database. After you start the download process, the Blackbaud Internet Solutions Download process status page tracks the progress of the download process.



Note: For information about how to download transactions from your website, refer to Download Web Transactions on page 23.

Under **Download status**, you can view information about the download process. You can view the status, when the process started and ended, who started it, how long it ran, the server used, the number of records processed, the number of records that processed successfully, and the number of records that failed to process. To update the process status page with the latest information, click **Refresh** beside **Download status**.

Note: If the status indicates the download completed with exceptions, go to the Failed Transactions tab of the Web Transactions page to view and manage the failures.

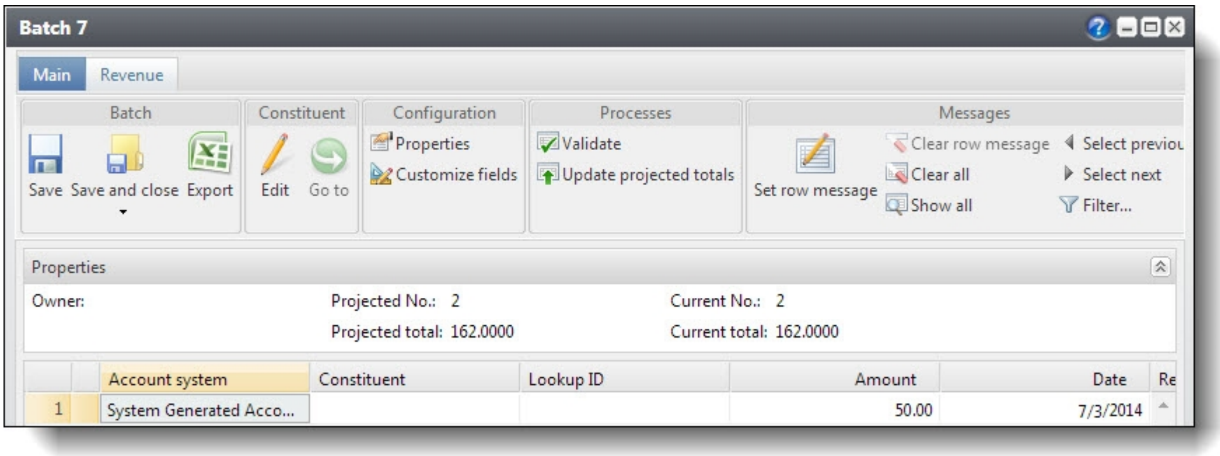
After the download process is complete, you can return to the Web Transactions page to manage an uncommitted batch created or updated during the download process. To return to the Web Transactions page, under **Tasks**, click **Blackbaud Internet Solutions transactions**.

Uncommitted Web Transactions

After you download transactions from your website, you can edit batches to update the data. On the batch data entry screen, each record has a separate row in the spreadsheet. Batches can include an unlimited number of records. For information about how to update data for each batch type, refer to Web Transaction Batch Types: Important Considerations on page 38.

Edit an uncommitted web transaction batch

1. From *Web*, click **Manage web transactions**. The Web Transactions page appears.
2. On the Transactions tab, under **Uncommitted batches**, click the double arrows beside a batch to expand its row and then click **Edit batch**. The batch data entry screen appears. The items on the screen depend on the transaction type.



3. In the grid, each downloaded transaction appears in a separate row. For each transaction, enter or update the information as necessary.
   - Website user signups use batch templates with the Constituent Update Batch on page 39.
   - Donations use batch templates with the Enhanced Revenue Batch on page 44.
   - Profile updates use batch templates with the BBIS Profile Update Transaction Batch on page 48
   - Event registrations use batch templates with the BBIS Event Registration Transaction Batch on page 55.
   - Memberships use batch templates with the Membership Dues Batch on page 63.
   - From the toolbar above the grid, you can perform common tasks for batch data entry. For example, you can view detail information about a transaction and specify whether to use all the information in the database. Perform the tasks necessary to complete your data entry. For information about the data entry tasks, refer to Web Transaction Batch Types: Important Considerations on page 38.
4. Click **Save and Close**.
   - If the program detects an error such as a missing required field, a message informs you that you cannot save the batch. Click **OK** and correct any errors.
   - If the program detects no errors, a message confirms that the batch was saved successfully. To return to the Web Transactions page, click **OK**.

Update a Web Transaction Batch to the Next Workflow Status

When a batch is ready to move to the next workflow state, you can update its status. For example, your organization's workflow for a batch with ***Blackbaud Internet Solutions*** donations can specify that after you download transactions into a batch and edit the data, an approver must validate the data entry before the batch can be committed to the database. To submit the batch for approval, you must update its status to the next state of the workflow.

For information about how to update a batch status, refer to the *Batch and Import Guide*.

Note: If the batch is in the final state of its workflow before committal, the **Update status** option is disabled. To move to the next state, you must commit the batch. For information about how to commit a batch, refer to Commit a Web Transaction Batch on page 27.

Commit a Web Transaction Batch

After a batch with ***Blackbaud Internet Solutions*** transactions completes its workflow, you can commit it to the database. When you commit a batch to the database, the program uses the data in the batch to automatically create or update records in the database. When a batch is committed, you can view its batch commit status page and generate control and exception reports.

For information about how to commit a batch, refer to the *Batch and Import Guide*.

Note: If the batch is not in the final state of its batch workflow before it can be committed, the **Commit** option is disabled. Before you can commit a batch, it must complete the states of the batch workflow. To move to the next state, you must update the batch to the next state in the workflow. For information about how to update the status of a batch, refer to Update a Web Transaction Batch to the Next Workflow Status on page 27.

When you commit a constituent update batch that includes a new user registration that is linked to a constituent who is already a registered website user, the transaction creates an exception. If you select to create an exception batch, you can delete the transaction from your database. From the website, your organization can send the constituent an email reminder with the existing login information. To send an email message, go to your administrative ***Blackbaud Internet Solutions*** site and go to *Email*, *Messages*.

Delete a Web Transaction Batch

Tip: Before you delete any information, we recommend that you back up your database.

You can delete a batch with ***Blackbaud Internet Solutions*** transactions from your database.

On the Web Transactions page, under **Uncommitted batches**, click the double arrows beside the batch to expand its row and then click **Delete batch**. On the confirmation message that appears, click **Yes**. You return to the Web Transactions page, and the batch no longer appears.

Note: When you delete an uncommitted batch, the transactions in the batch return to the original batch assignment that previously contained them in the **Pending transactions** grid. This way, you can download the transactions again for processing in another uncommitted batch.

Automatically Download and Process Web Transactions

With *Queue*, *Information library*, and *Commit Multiple Batches*, you can create a process to automatically download your website transactions into batches and then commit those batches to your database. To save time and effort, set up a process to automatically download and process transactions from your website.

Configure a process to automatically download and process web transactions

1. In *Information library*, create a batch ad-hoc query for batches you can commit with ***Blackbaud Internet Solutions*** transactions. When you do this, set up these filters for the tables under **Field Options** on the Output/Filters tab:
   - For **Batch Designs**, apply criteria where **Batch type** is “One Of” each web transaction batch type configured in your database.
   - For **Batch Workflow States**, apply criteria where **Allow commit** is “Equal To” the value “Yes.”

   To access ad-hoc query, go to *Analysis* and click **Information library**. For information about how to add an ad-hoc query, refer to the *Query and Export Guide*.
2. In *Commit multiple batches*, create a commit multiple batches process to automatically commit the batches in the new ad-hoc query. When you add the commit multiple batches process, select **Create exception batches** and **Create control reports**.

   To access *Commit multiple batches*, go to *Administration* and click **Batch**. On the Batch page, click **Commit multiple batches**. For information about how to add a commit multiple batch process, refer to the *Batch and Import Guide*.
3. In *Queue*, create a new queue process that includes each of the Blackbaud Internet Solutions Download processes and the new commit multiple batches process. When you create the queue process, set its job schedule so it runs automatically at a set interval.

Note: When you create the queue process, we recommend you set its job schedule to run on an hourly basis.

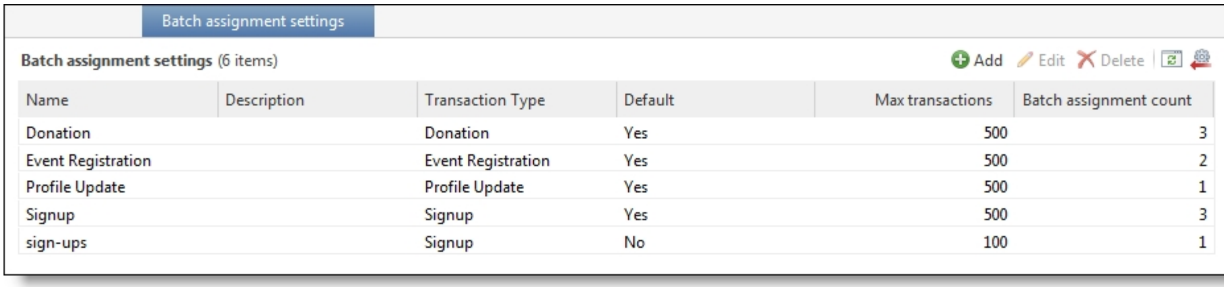
   To access *Queue*, go to *Administration* and click **Queue**. For information about how to add a queue process, refer to the *Administration Guide*.

4. In *Web*, configure the integration with the website and select the criteria to use to automatically match online donors with constituents. For information about the configuration, refer to Configure Integration on page 15.

Note: When you select the criteria to use to match donors with constituents, we recommend that you select at least **Last name/Organization name**, **First name**, **Address**, and **Zip code** on the Auto-match tab.

Batch Assignment Settings Tab

On the Batch assignment settings tab, you can manage batch assignments for web transaction types that you download from your ***Blackbaud Internet Solutions*** website. After you create a batch assignment setting, the grid displays its name, description, transaction type, whether it is the default setting for the transaction type, the maximum number of transactions per batch, and the number of batch owners that the setting assigns transactions to.



Name	Description	Transaction Type	Default	Max transactions	Batch assignment count
Donation		Donation	Yes	500	3
Event Registration		Event Registration	Yes	500	2
Profile Update		Profile Update	Yes	500	1
Signup		Signup	Yes	500	3
sign-ups		Signup	No	100	1

On the Batch assignment settings tab, you can add, edit, and delete batch assignment settings when you have the necessary security rights and system role. To update the grid, click **Refresh**.

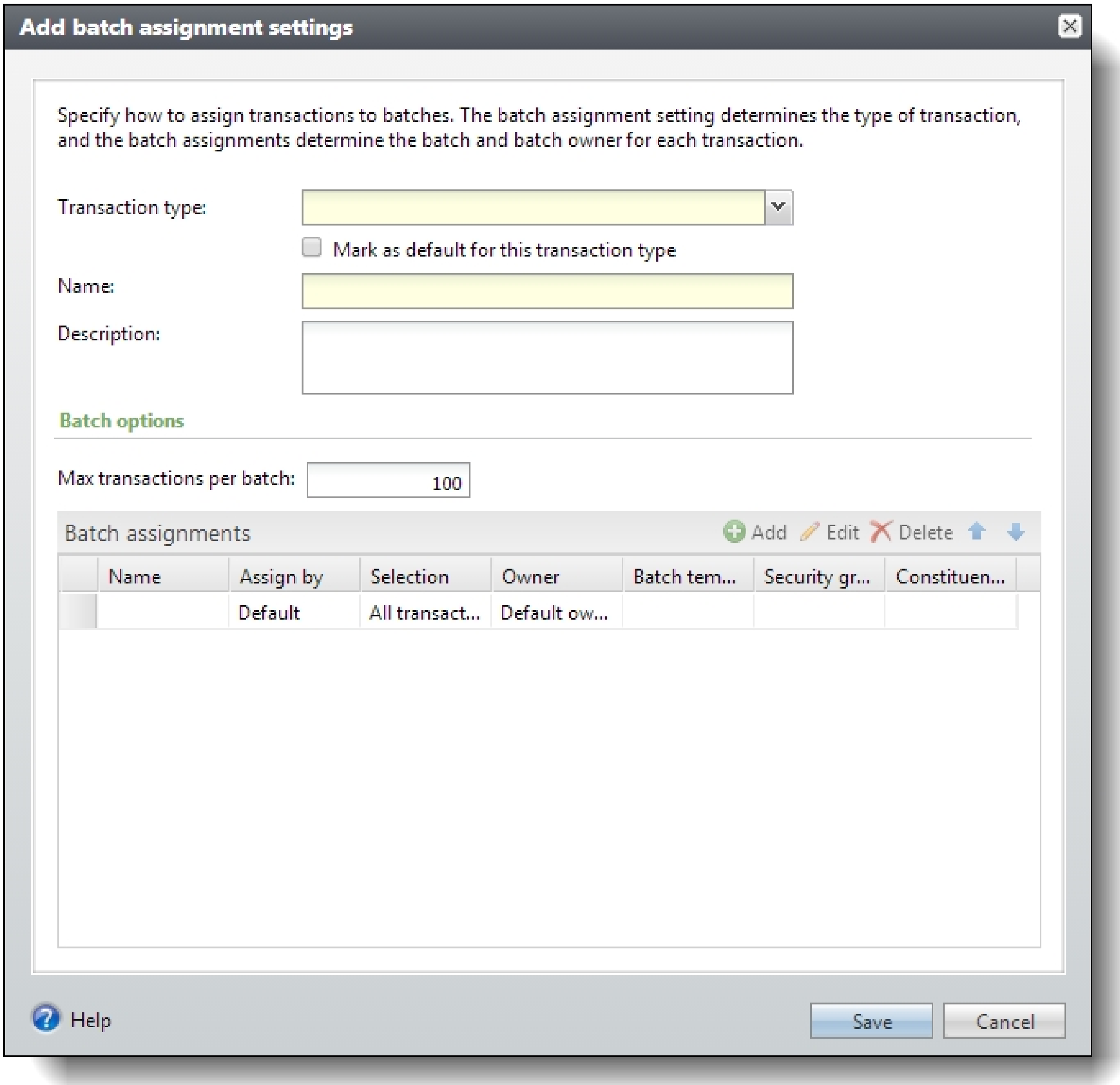
Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the **Bill to** field marked as required.

Add Batch Assignment Settings

On the Batch assignment settings tab of the Web Transactions page, you can create batch assignment settings to determine how the program downloads transactions from ***Blackbaud Internet Solutions***.

Add a batch assignment setting

1. From *Web*, click **Web transactions**. The Web Transactions page appears.
2. On Batch assignment settings tab, click **Add**. The Add batch assignment settings screen appears.



3. In the **Transaction type** field, select the web transaction type to assign to the batch. Transaction types include signups, profile updates, donations, event registrations, and memberships.
4. If this is the default batch assignment setting for the transaction type, select **Mark as default for this transaction type**. The program automatically uses the default batch assignment setting when it downloads transactions, but you can create additional batch assignment settings for transaction types and manually download transactions.
5. In the **Name** and **Description** fields, enter a unique name and description to identify the batch assignment setting.
6. In the **Max transactions per batch** field, enter the maximum number of transactions to download into a batch.

7. In the **Batch assignments** grid, click **Add** to assign a batch and batch owner to the batch assignment setting. The Add batch assignment screen appears. For information about the options on this screen, refer to Add Batch Assignments on page 31.

Note: The **Batch assignments** grid is disabled until you select a type in the **Transaction type** field.

8. Select the default batch assignment in the **Batch assignments** grid and click **Edit**. The Edit batch assignment screen appears. To save the batch assignment setting, you must select a batch template for the default batch assignment.
9. If you add multiple batch assignments, use the up and down arrows to arrange them in the order to apply them. The default batch assignment is always last in the grid and you cannot move it.
10. Click **Save**. You return to the Web Transactions page.

Add Batch Assignments

From the Add batch assignment settings screen, you can add a batch assignment to select the batch template and batch owner for the batch assignment setting. When you add multiple batch assignments, you can use transaction filters to assign transactions to batch owners based on selection criteria or web page.

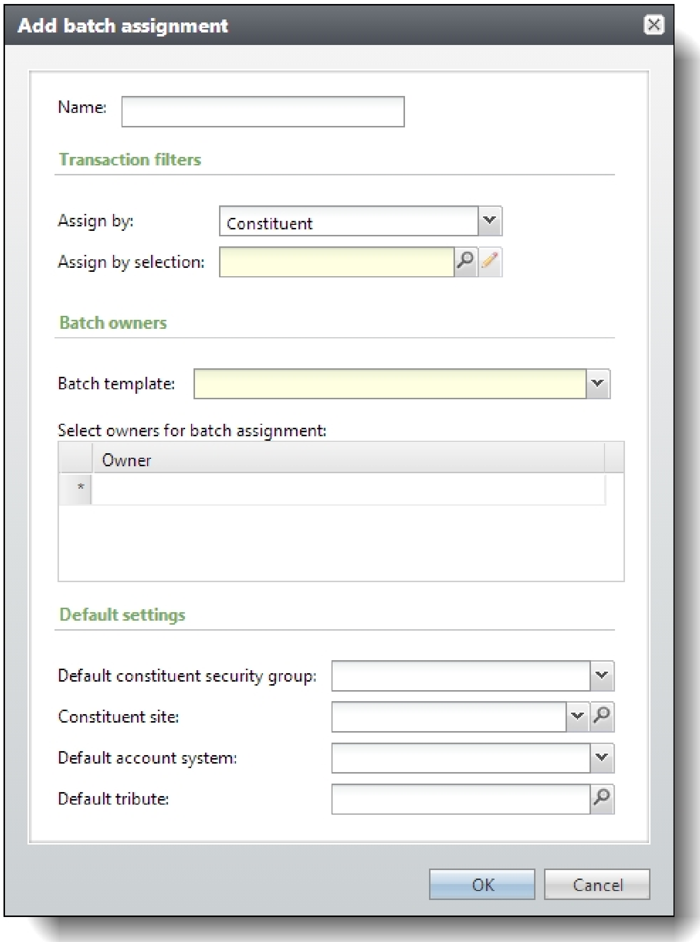
When you add a batch assignment for donations, you can assign the donations to a default tribute if they meet criteria that you specify. For example, you can assign all the donations that you receive on a specific page to the same tribute.

Assign a batch assignment

1. On the Add batch assignment settings screen, click **Add** in the **Batch assignments** grid. The Add batch assignment screen appears.

   Note: If you cannot click **Add**, make sure a type is selected in the **Transaction type** field. The **Batch assignments** grid is disabled until you select a type.

2. In the **Name** field, enter a unique name to identify the purpose of the batch assignment.



3. Under **Transaction filters**, select the criteria to use to assign transactions to a batch. In the **Assign by** field, select the category to filter against. For example, select "Constituents" to filter based on the constituents who submit transactions or "Page" to filter based on the web pages where transactions occur.
4. In the field after the **Assign by** field, select the subset of the category to include in the batch assignment. For example, if you assign transactions based on the constituents who submit them, enter a selection of constituents such as board members or major donors. If you assign transactions based on the web pages where they occur, enter the IDs for the web pages.

   The field after the **Assign by** field depends on the category you select.

   - If you select “Page,” the **Assign by page** field appears. In the grid, enter page IDs for the web pages to include in the batch assignment. To search for a page ID, click the binoculars. A search screen appears.
   - If you host multiple ***Blackbaud Internet Solutions*** websites and select “BBIS Site,” the **Assign by site** field appears. In the grid, select the sites to include in the batch assignment. Sites only appear if you have the proper security rights.
   - For all other selections, the **Assign by selection** field appears. Enter the selection to

include in the batch assignment. To search for a selection, click the binoculars. A search screen appears.

5. In the **Batch template** field, select the batch template to use. The batch template defines basic information about the batch such as the fields to include and default values. For profile updates and event registrations, the program includes default ***Blackbaud Internet Solutions*** batch templates, while you must create batch templates for donations, event registration, and memberships.
   - Website user signup transactions use the batch template Constituent Update Batch on page 39.
   - Donation transactions use the batch template Enhanced Revenue Batch on page 44.
   - Profile update transactions use the batch template BBIS Profile Update Transaction Batch on page 48
   - Event registration transactions use the batch template BBIS Event Registration Transaction Batch on page 55.
   - Membership transactions use the batch template Membership Dues Batch on page 63.

   Note: Batch templates for profile update, event registration, and memberships transactions use a workflow that requires the first step be in an editable state. This allows the program to create uncommitted batches when you download transactions and to insert data from website users in those batches. If the first step of the workflow is not in the editable state, your batch template does not appear in the **Batch template** field. For information about batch workflows, refer to the *Batch and Import Guide*.

6. In the **Select owners for batch assignment** grid, select owners for the batches where the program downloads transactions. If you do not select an owner, the program automatically assigns batches to default batch owners.

   If you select multiple batch owners, separate batches are created for each batch owner, and transactions are assigned in round-robin order. For example, if you select two batch owners and download four transactions, two transactions are assigned to each batch owner.

   Note: Each time you download transactions, the round robin-order assignment order starts over with the first batch owner. For example, if you select two batch owners and download three transactions followed by three more transactions later, two transactions from each download are assigned to the first batch owner for a total of four transactions, while only one transaction from each download is assigned to the second batch owner for a total of two transactions.

7. To assign the constituent records that are created when you commit the batch to a specific security group, in the **Default constituent security group** field, select the security group authorized to manage the constituent records. The system administrator configures the selections available for this field.
8. If your organization includes multiple sites, in the **Constituent site** field, select the site to associate with the batch assignment.
9. In the **Default account system** field, select the account system to use for the batch. Revenue transactions in the batch for the batch assignment are associated with that account system by default. However, you can manually change the account system for transactions in the batch.
10. When you add a batch assignment for donations, the **Default tribute** field appears. To assign

the revenue records that are created when you commit the batch to a specific tribute, click the binoculars and use the Tribute Search screen to find the tribute in your database.

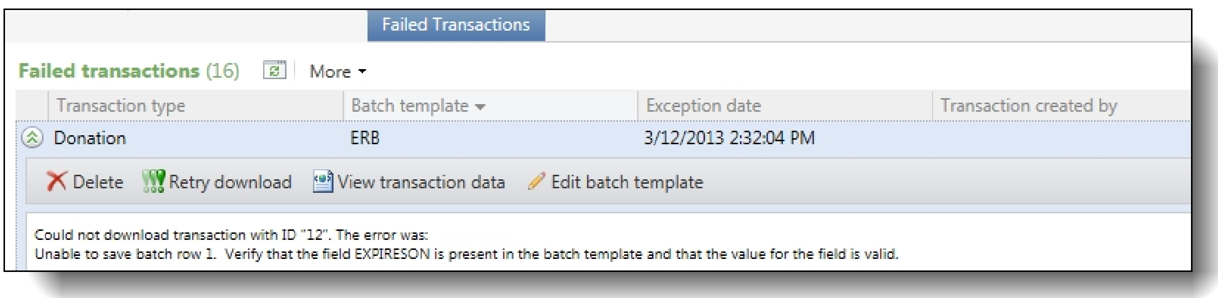
11. Click **OK**. You return to the Add batch assignment screen.

Failed Transactions Tab

On the Failed Transactions tab of the Web Transactions page, you can view and manage transactions that failed to download into batches. The tab includes the following information.

- The ***Blackbaud Internet Solutions*** transaction type. For example, Donation.
- The batch template that failed to download the transaction. For example, Enhanced Revenue Batch.
- The exception date.
- The application user in ***Blackbaud CRM*** that downloaded the batch with the failed transaction.
- The failed transaction reason. For example, "Unable to save batch row. Verify that the field EXPIRESON is present in the batch template and that the value for the field is valid."

This information appears on the tab after a failed attempt to download them from the **Pending transactions** grid on the Transactions tab.



The **Failed transactions** grid displays transaction types, batch template names, dates when downloads failed, and users who created transactions. You can expand transactions to view the error messages and to:

- Delete them so the program no longer attempts to download them into batches
- Resubmit them for download
- View the form data in XML format
- Edit the associated batch templates to add fields that are necessary to download them

Tip: A common reason transactions fail is because a field exists on your ***Blackbaud Internet Solutions*** website that does not exist in your batch template. For example, you include the **Card Expiration** field on the donation web page, but the batch template does not include this field. The program cannot process data for a field that is missing from the template so a transaction failure occurs. To identify the failure, the **Failed transactions** grid displays the message, "Unable to save batch row. Verify that the field EXPIRESON is present in the batch template and that the value for the field is valid." To quickly add the field to the template, click **Edit batch template** on the action bar.

The Edit batch template screen appears for you to add the field, save the template, and return to the tab.

Delete a Failed Transaction

Tip: Before you delete any information, we recommend that you back up your database.

After you review a failed transaction, you can delete it so the program no longer attempts to download it into batches.

On the Failed Transactions tab of the Web Transactions page, expand the transaction and then click **Delete**. On the confirmation message that appears, click **Yes**. You return to the Web Transactions page. The transaction has been deleted from the database and no longer appears in the grid.

Warning: When you delete a failed transaction, be aware the website user's credit card or debit card is not automatically refunded. In this scenario, it is up to your organization to check your B***lackbaud Payment Service*** logs and reconcile the information with your merchant to determine how to manage a refund to the user.

Retry a Failed Transaction Download

After you correct transaction errors, you can attempt to download the transaction again. For example, if a form included a field that was missing from the batch template, you can add the field to the batch template and then retry the download.

On the Failed Transactions tab of the Web Transactions page, expand the transaction and click **Retry download**. The program executes a business process and the page refreshes. When the download is successful, the transaction no longer appears in the grid. Instead, it appears in a batch on the Transactions tab.

Note: If a batch already exists in its initial state for a transaction type and owner, the program automatically downloads applicable transactions to that existing batch. Otherwise, it creates a batch for the transactions.

View Failed Transaction Data

To help you identify potential reasons for a failed transaction, you can view the transaction's data in XML format. The XML displays the form fields and the values submitted by the website user.

To view the XML data, expand the transaction on the Failed Transactions tab of the Web Transactions page and click **View transaction data.** After you review the form, click **Close** to return to the Web Transactions page.

Edit Failed Transaction Batch Template

After you view a failed transaction, you can edit the associated batch template. For example, a transaction might fail to download when a form field is missing on the template.

To access the batch template design screen, expand the transaction on the Failed Transactions tab of the Web Transactions page and click **Edit batch template.** After you edit the template, click **Save** to return to the Web Transactions page. To attempt the download after you correct template errors, click **Retry download**. For information about batch templates, refer to the *Batch and Import Guide*.

Web Transaction Batch Types

When you download transactions from from the **Pending transactions** grid on the Transactions tab, they download into uncommitted batches. From an uncommitted batch, you can view details about the data in the transactions. When you view details, you can select the information to use to create or update records in your database.

Note: For information about how to download transactions from your website, refer to Download Web Transactions on page 23. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.

Web Transaction Batch Types: Important Considerations

Before you review information about the individual web batch types, you can review information about batch tasks that are common to all batch types. For example, you can delete a row of data, export data to Microsoft *Excel*, find and replace values in a batch, set a message for a row in the batch, and validate the batch. For more information about batch tasks, refer to the *Batch and Import Guide*.

Review additional information about web batch types.

- You can edit batch designs. However, to make sure that event registration and profile update transactions download correctly from your website, we strongly recommend you *not* edit the default BBIS Profile Update Transaction Batch batch and BBIS Event Registration Transaction Batch templates. These default batch designs are configured to properly download and commit data from ***Blackbaud Internet Solutions***.
- When you delete a transaction from a batch and save the batch, the website also deletes the transaction from its database.
- When you download transactions to an uncommitted batch, you can view details about each transaction from your website. When you view the details, you can specify the information from the transaction to create or update records in your database. For information about how to view transaction detail information, refer to these sections.
  - Website user signup transactions use the batch template Constituent Update Batch on page 39.
  - Donation transactions use the batch template Enhanced Revenue Batch on page 44.
  - Profile update transactions use the batch template BBIS Profile Update Transaction Batch on page 48
  - Event registration transactions use the batch template BBIS Event Registration Transaction Batch on page 55.
  - Membership transactions use the batch template Membership Dues Batch on page 63.
- In an uncommitted batch, you should attempt to match every website user to a constituent record to make sure constituent information is current and help prevent duplicate constituents in the database. The Constituent Update Batch and Enhanced Revenue Batch types use your organization's constituent update rules to identify possible matches. For information about constituent update rules, refer to the *Duplicate Constituents and Merge Tasks Guide*. The fields you select on the Auto-match tab in the **Configure integration** task are used to link web site users to constituent records for the BBIS Profile Update Transaction Batch, BBIS Event Registration Transaction Batch, and Membership Dues batch types. For information about the Auto-match tab, refer to Configure integration - Auto-match tab on page 18.
- You can assign a constituent to a security group when you download a transaction from your website. When you do this, only users in that group can access and manage the constituent records created when you commit the transaction information to the database. For information about how

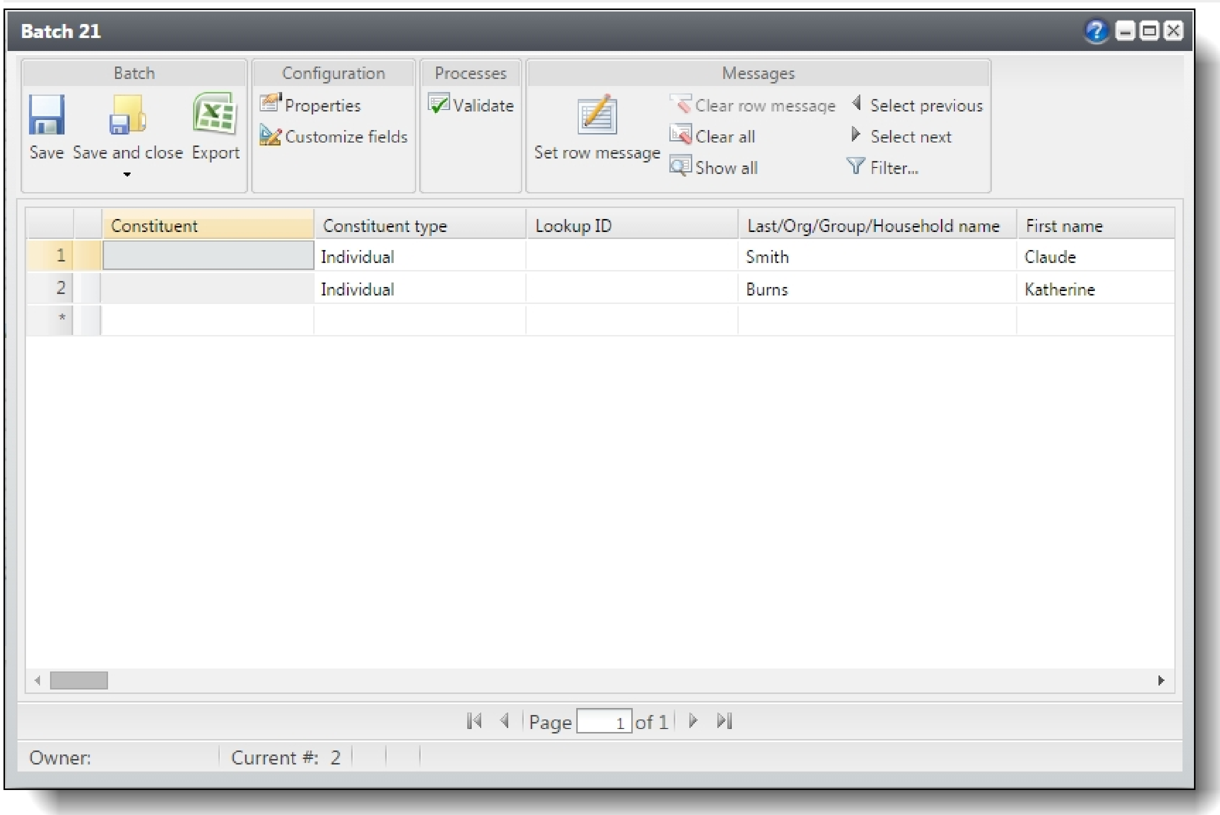
to assign the downloaded transactions information to a security group, refer to Assign Constituent Information to a Security Group on page 54.

Constituent Update Batch

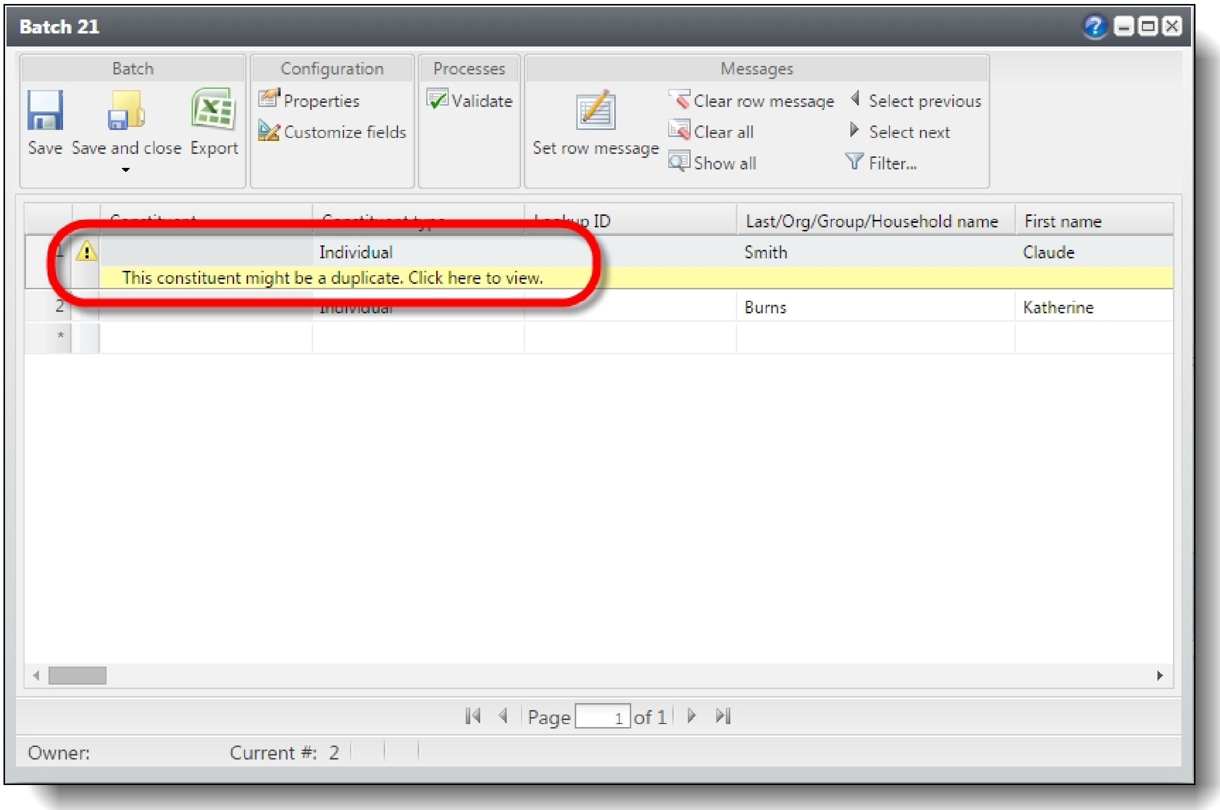
Warning: As of ***Blackbaud CRM 3.0***, the batch process has been improved for signup transactions. The program now uses a batch template with the Constituent Update Batch type instead of the BBIS Signup Transaction Batch batch type. When you upgrade to ***Blackbaud CRM 3.0*** or a subsequent version from any version prior to ***3.0***, you must perform a few manual steps before you can resume downloading donation and signup transactions. For more information about these steps, refer to the Upgrade Path for Web Transaction Batches document.

Website user signups transactions from your ***Blackbaud Internet Solutions*** website download into the Constituent Update Batch type. When you open an uncommitted Constituent Update Batch, the data appears directly in the rows of the batch data entry screen.

Note: When you open an uncommitted batch, you view details about the data in the transactions and you select the information to use to create or update records in your database. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.



When you validate a Constituent Update Batch, the program automatically runs a duplicate check to find any existing constituents that may match constituents in the batch. When the match confidence score for a pair of constituents falls within the range defined for possible matches, the program flags the incoming record as a potential duplicate and displays an exception in the batch data entry grid.



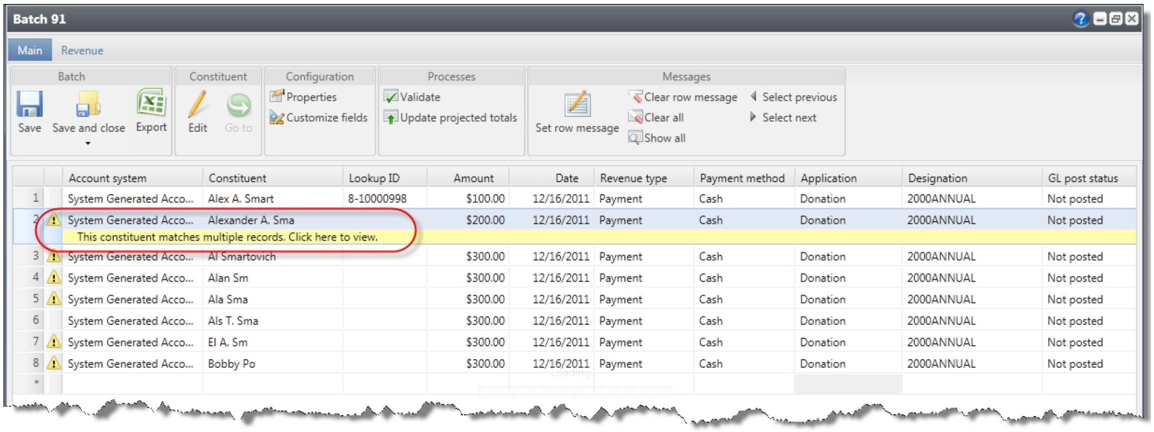
To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record.

Note: If you click the binoculars in the **Individual** column to manually link the incoming constituent data with another constituent record that is different from the constituent record matches on the duplicate resolution screen, be aware the existing constituent record data overrides the incoming constituent data. This means when you select the other constituent record in the column, all incoming constituent data is removed and does not process to the constituent record.

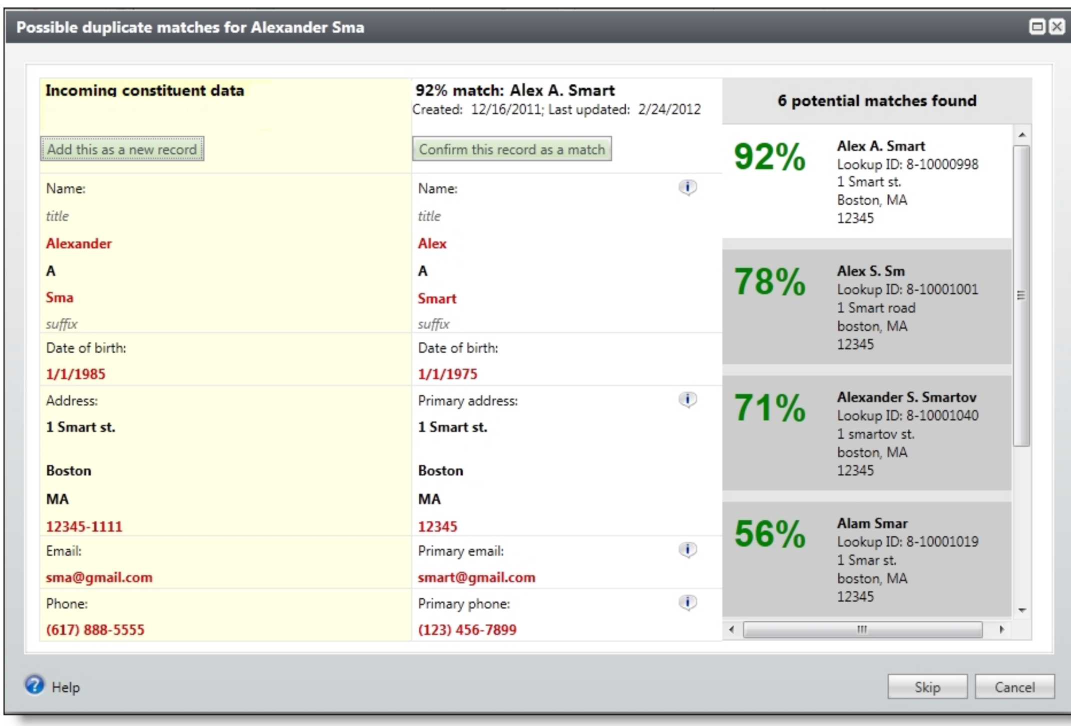
Resolve duplicates in a Constituent Update or Enhanced Revenue Batch

1. From a validated batch that contains exceptions, find a row in the grid with a yellow caution symbol. Click the symbol and a duplicate records message appears under the row.

Note: When an incoming constituent is similar enough to an existing constituent to qualify for an automatic update (their match confidence score is above the top matching threshold), but your organization's constituent update rules require manual review for certain fields, the batch generates an exception that requires you to review the incoming fields and manually select which action to take. For information about constituent update rules, refer to the *Duplicate Constituents and Merge Tasks Guide*.



2. Click the message. The Possible duplicate matches screen appears.



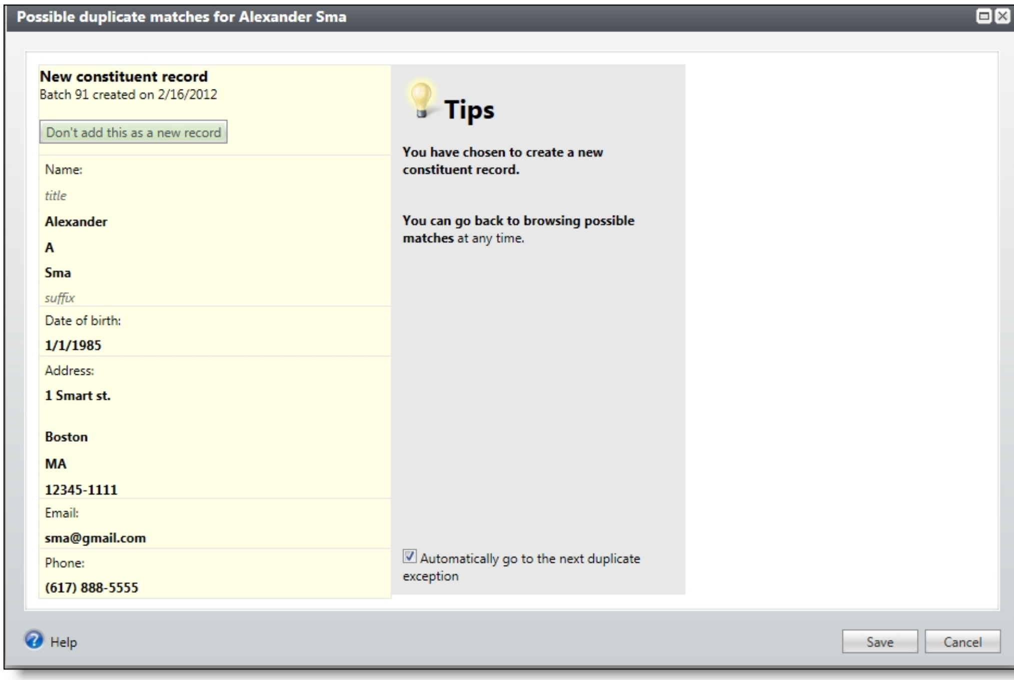
Warning: The Possible duplicate matches screen does not appear when you turn off matching via the **Enable/disable matching** configuration task in *Administration*.

The **Incoming constituent data** column displays information from the new record.

The **Potential Matches** column on the right lists all existing constituents in the database that are possible matches, ranked from the highest to lowest match confidence score. The percentage represents the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about the match confidence score, refer to the *Duplicate Constituents and Merge Tasks Guide*.

When you select a constituent in the **Potential matches** column, its information appears in the middle column so you can compare the incoming and existing records side-by-side. Black fields are exact matches. Red fields are similar but need careful review. After you compare the records, you can do one of the following:

- When you decide the incoming constituent is not a duplicate, click **Add this as a new record**. The screen displays the name and contact information for the new record. Click **Save** to create a new record, or if you change your mind, you can click **Don't add this as a new record** to return to the previous screen.



- When you decide the incoming constituent matches an existing constituent, click **Confirm this record as a match**. Additional options appear. You can evaluate each red field and decide what to do with the incoming data: When you select to add or update a field, it appears green in the existing constituent column. When you select to ignore a field, it appears stricken through in the incoming constituent column.

a. To discard all new or conflicting data from the incoming constituent, click **Ignore all**.

b. To automatically apply the constituent update rules set on the Global data entry page of *Administration*, click **Use my organization's rules**. For example, when you have **Add incoming phone number as new phone number** set as a rule, and you click **Use my organization's rules**, the program automatically adds the incoming phone number to the existing record. When your update rules require manual review for certain fields, you must review those incoming fields and manually select which action to take. As a reference, your organization's selected update rules appear in the **Tips** column. For information about constituent update rules, refer to the *Duplicate Constituents and Merge Tasks Guide*.

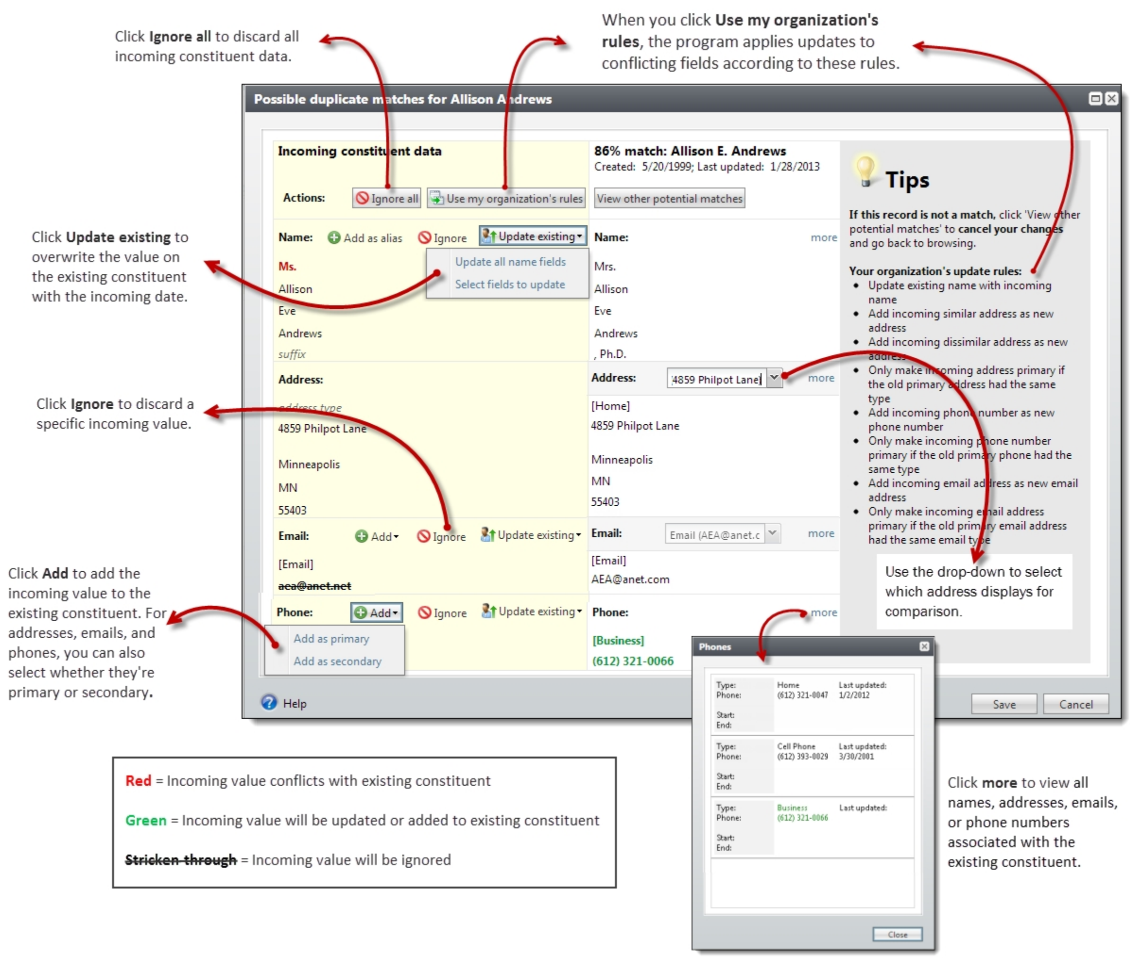
c. To add the name as an alias to the existing constituent, click **Add as alias**. To add the address, email, or phone number as primary or secondary on the existing constituent (rather than replace the existing value), click **Add** and select **Add as primary** or **Add as secondary**. When the incoming constituent has information that is blank on the existing constituent, you can click **Add** to add that data to the existing record.

Note: When the existing constituent has multiple addresses, phone numbers, or emails, use the drop-down to select which one to display.

Note: Click **more** to view the history of changes for each field on the address, phone number, or email.

d. To discard the incoming value (neither add a new value nor update the existing value), click **Ignore**.

e. To replace the existing name, address, email, or phone number with the incoming value, click **Update existing** and select whether to update all fields or to select individual fields to update. If you select **Update all name/address/email/phone number fields**, the program moves all fields of that type to the existing constituent. If you select **Select fields to update**, the **Ignore** and **Update current** options appear so you can handle each field individually.



3. Click **Save** to save your changes to the existing record, or if you change your mind, you can click **View other potential matches** to return to the previous screen.

Note: When you select **Automatically go to the next duplicate exception**, the program automatically opens the next record in the batch with possible matches when you click **Save**.

> ***Note:*** For Enhanced Revenue batches, the constituent is updated automatically when you click **Save**.

4. Click **Save and close** to save the batch and return to the Uncommitted batches tab.

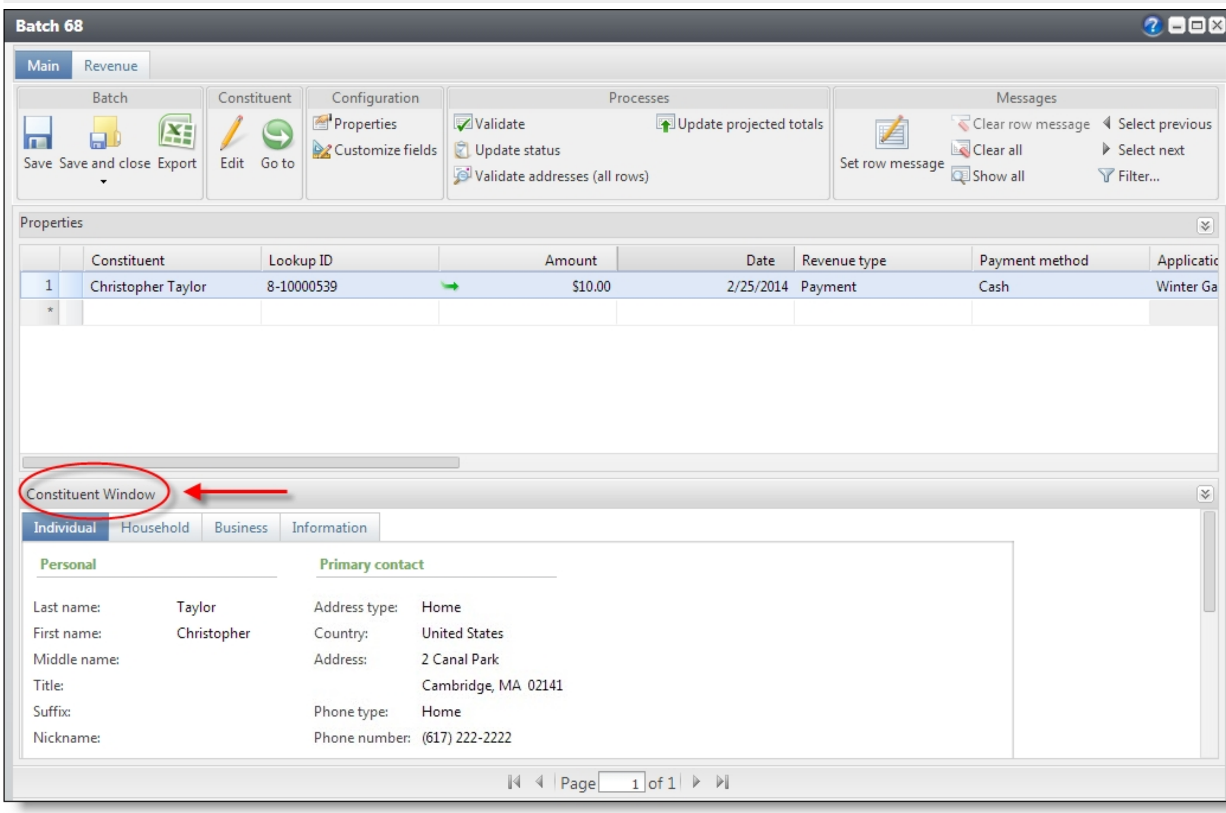
> ***Note:*** For Constituent Update batches, the program updates existing constituents with changes when you commit the batch.

Enhanced Revenue Batch

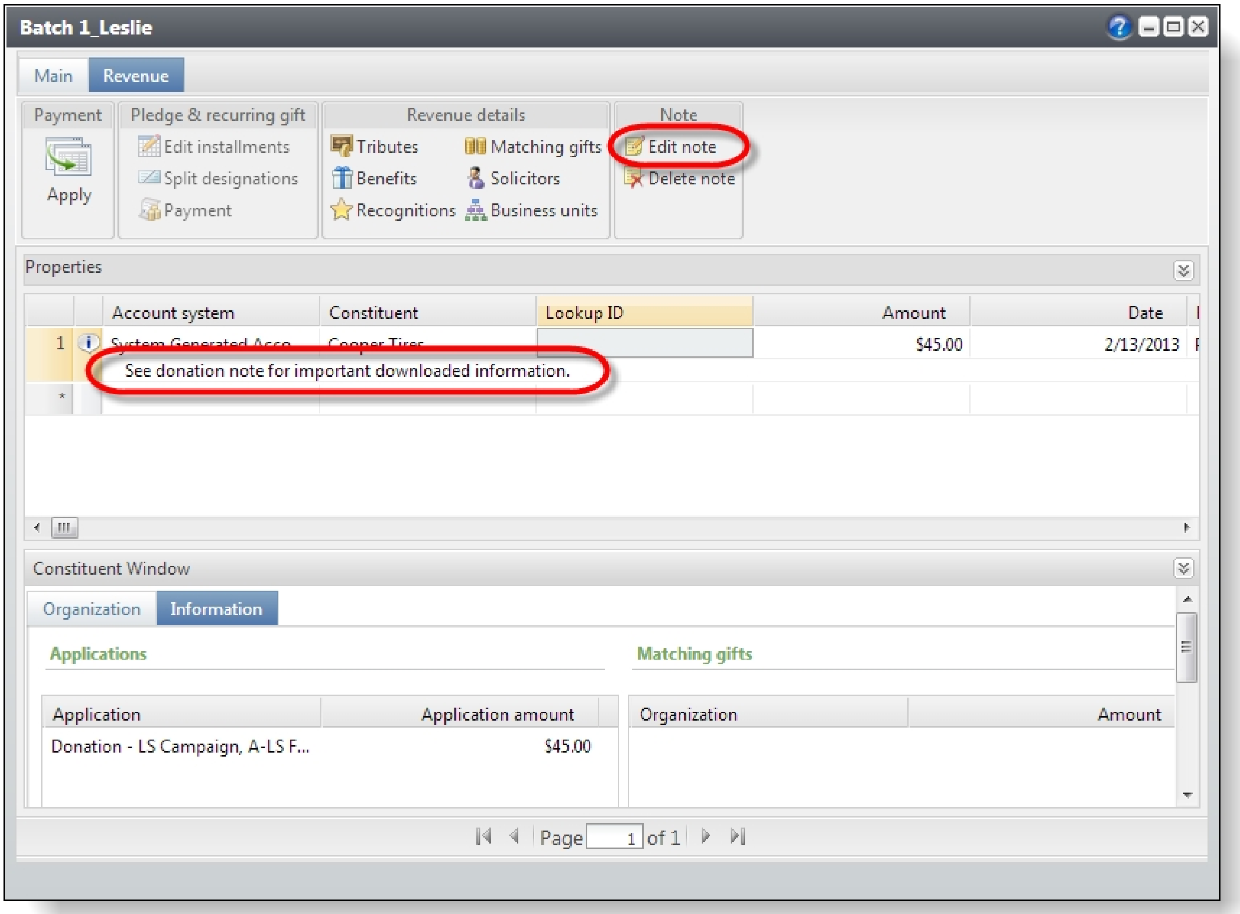
> ***Warning:*** As of ***Blackbaud CRM 3.0***, the batch process has been improved for donation transactions. The program now uses a batch template with the Enhanced Revenue Batch type instead of the BBIS Donation Transaction Batch type. When you upgrade to ***Blackbaud CRM 3.0*** or a subsequent version from any version prior to ***3.0***, you must perform a few manual steps before you can resume downloading donation and signup transactions. For more information about these steps, refer to the Upgrade Path for Web Transaction Batches document.

Web donation transactions from your ***Blackbaud Internet Solutions*** website download into the Enhanced Revenue Batch type. When you open an uncommitted Enhanced Revenue Batch, most data appears directly in the rows of the batch data entry screen and in the Constituent Window.

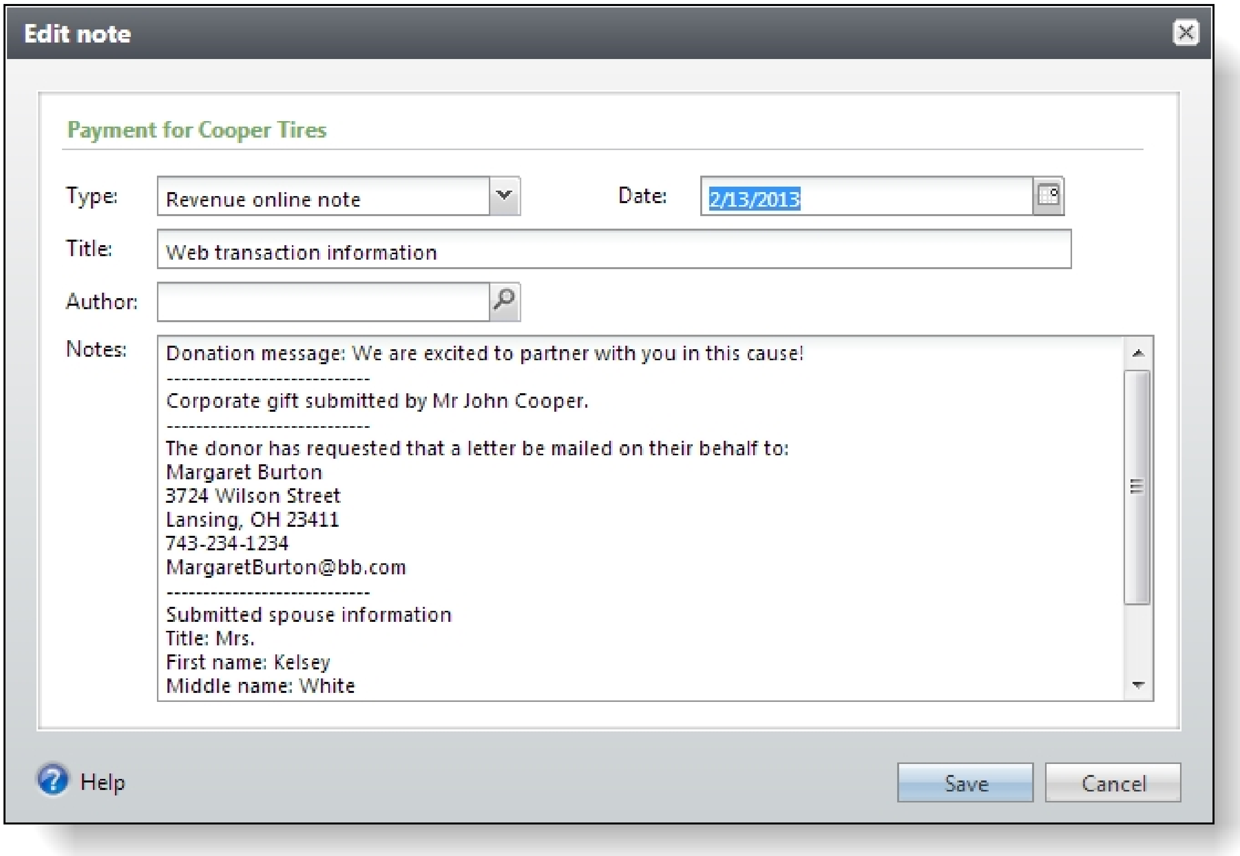
> ***Note:*** When you open an uncommitted batch, you view details about the data in the transactions and you select the information to use to create or update records in your database. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.



Enhanced Revenue Batch also attaches some data from web transactions as notes. This data includes donation notes from website users, corporate gift information, matching gift information, tribute acknowledgee information, and updates to spouse information. When a donation includes any of this information, a message in the batch row indicates that batch entry has a note attached.



To view the note, select the row in the batch and then click **Edit note** under **Note** on the Revenue tab. The Edit note screen appears.



On this screen, you can view data and decide whether any further actions are necessary. After you commit the batch, the note is saved with the revenue record.

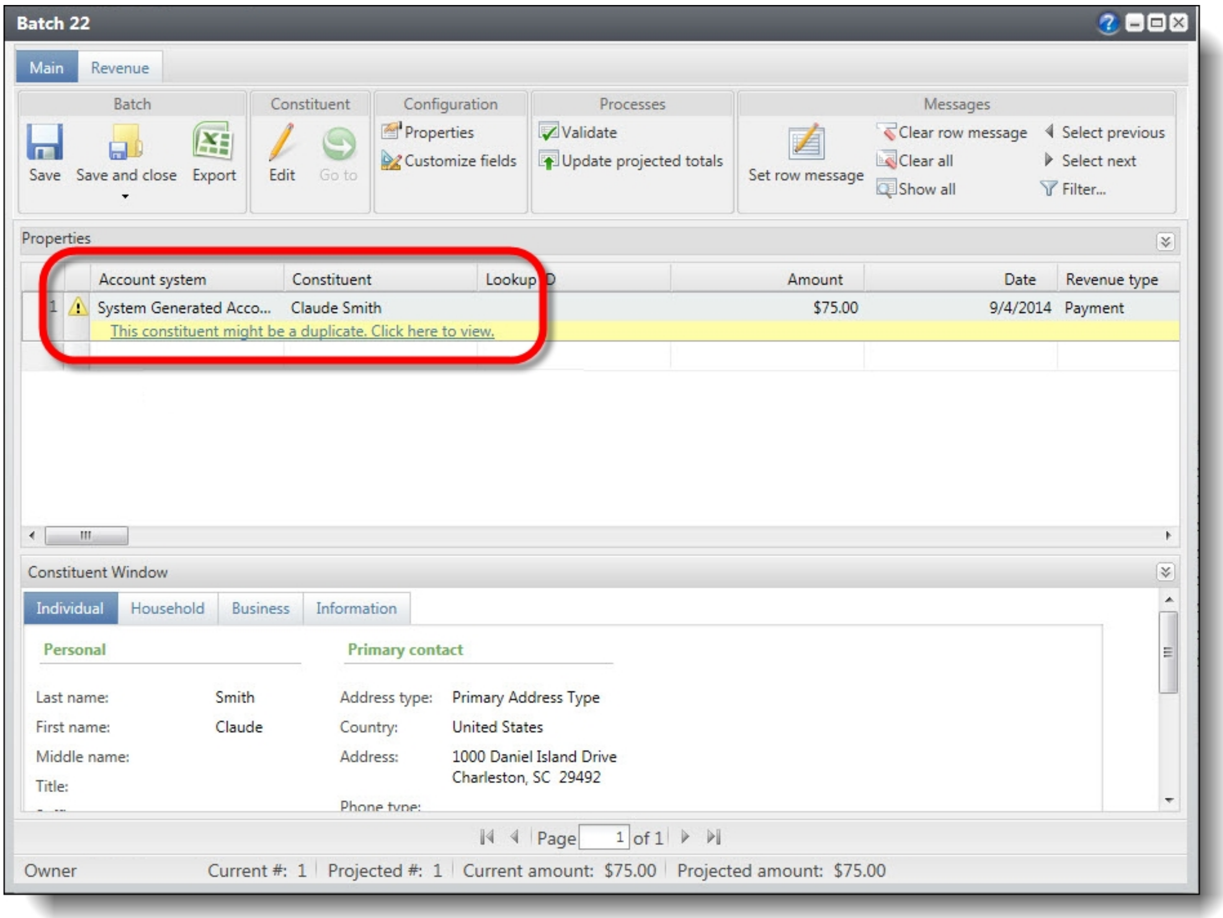
- For donation messages from website users, no action is necessary. Unless you delete the message, it is saved in the note and attached to the revenue record.

  > ***Note:*** Before you commit a batch with donation messages, you must either click **Save** on the Edit note screen for each the batch row that has an attached note or click **Clear all** under **Messages** on the Main tab to clear messages for the entire batch.

- For corporate gifts from organizations, after you commit the batch, you may want to check the organization record for a relationship to the individual who submitted the gift. If the individual is in your database but no relationship exists, you may want to add a relationship.
- For matching gifts, you can click **Matching gifts** under **Revenue details** on the Revenue tab of the batch data entry screen to create a matching gift record. If the matching organization is not already in your database and you have MatchFinder, you probably want to add the organization through MatchFinder before you enter gift information on the Add matching gift claims screen.
- For acknowledgee information, you can go to the tribute record after you commit the batch and manually add this information to the record.
- For updates to spouse information, you can compare the information to the existing spouse information to determine whether to update the existing spouse or create a new spouse record. This avoids incorrectly overwriting existing data or creating duplicate records.

> ***Note:*** Before you commit a batch with spouse information, you must either click **Save** on the Edit note screen for each the batch row that has an attached note or click **Clear all** under **Messages** on the Main tab to clear messages for the entire batch.

When you validate an Enhanced Revenue Batch, the program automatically runs a duplicate check to find any existing constituents that may match constituents in the batch. When the match confidence score for a pair of constituents falls within the range defined for possible matches, the program flags the incoming record as a potential duplicate and displays an exception in the batch data entry grid.



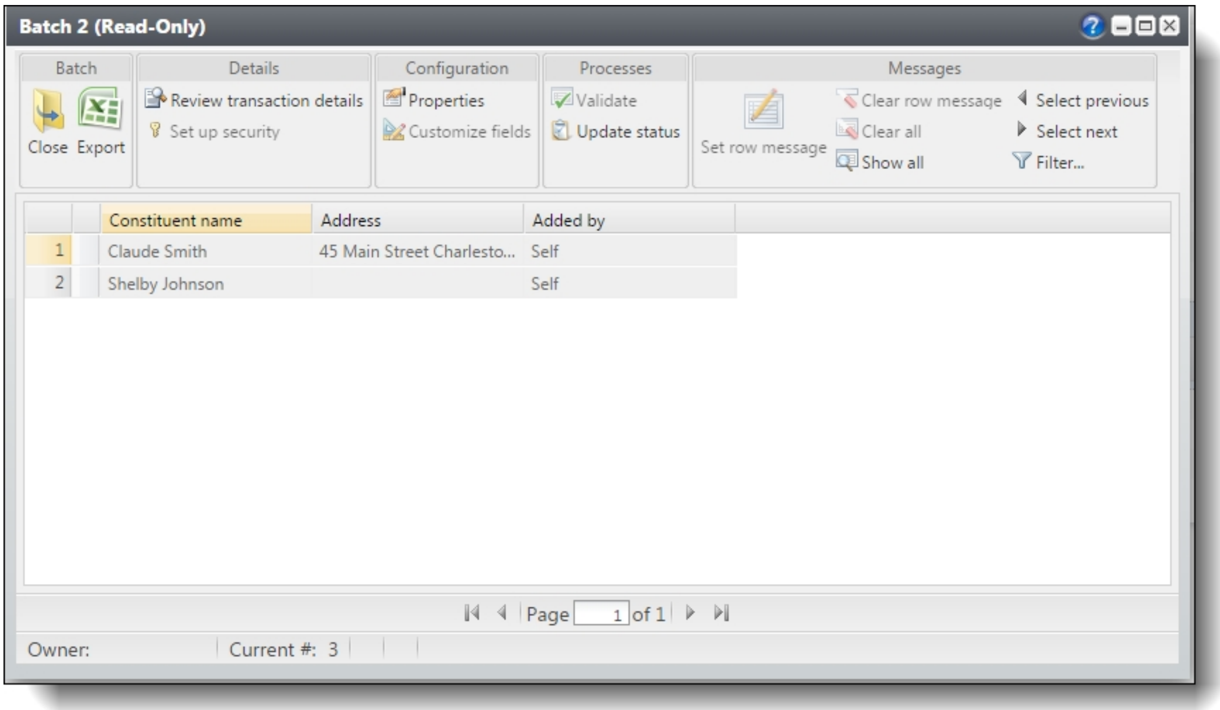
To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record. For information about the duplicate resolution screen, refer to Resolve duplicates in a Constituent Update or Enhanced Revenue Batch on page 40.

> ***Note:*** If you click the binoculars in the **Constituent** column to manually link the incoming constituent data with another constituent record that is different from the constituent record matches on the duplicate resolution screen, be aware the existing constituent record data overrides the incoming constituent data. This means when you select the other constituent record in the column, all incoming constituent data is removed and does not process to the constituent record.

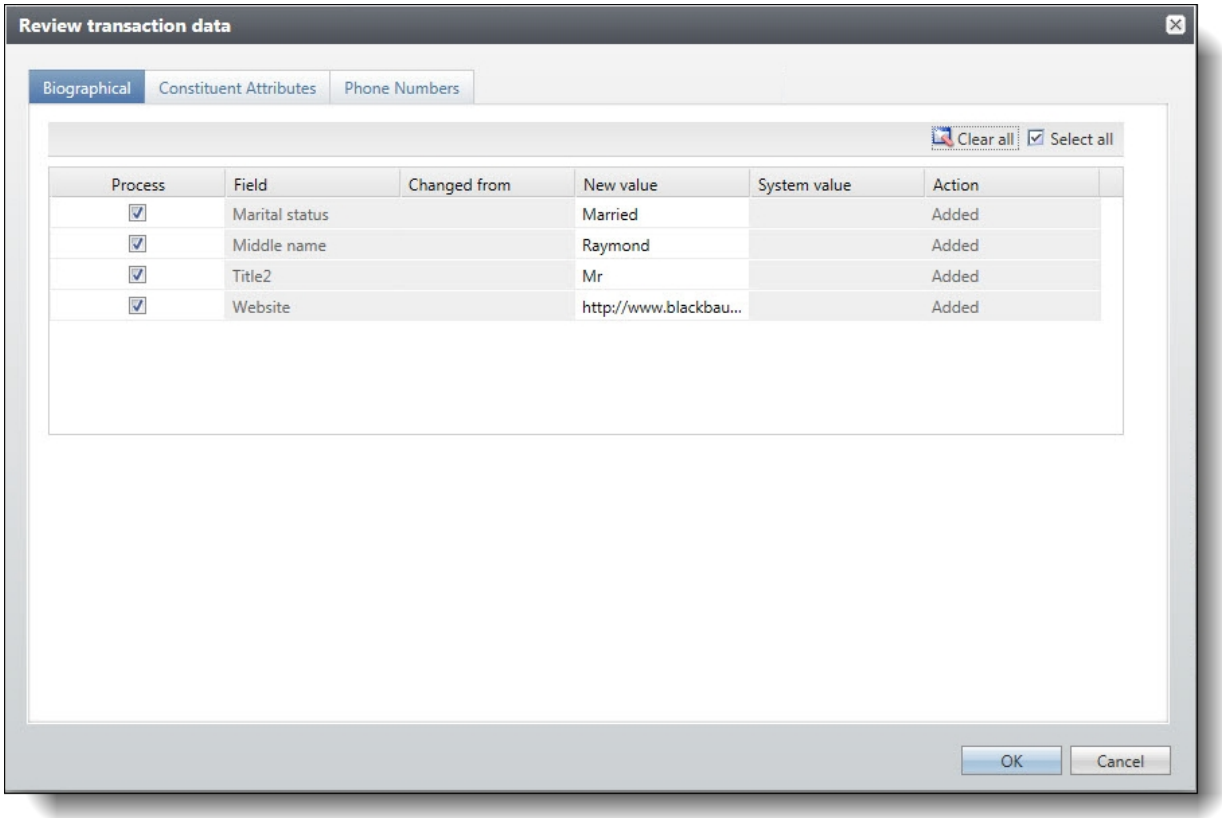
BBIS Profile Update Transaction Batch

Web profile update transactions from your ***Blackbaud Internet Solutions*** website download into the BBIS Profile Update Transaction Batch type. When you open an uncommitted BBIS Profile Update Transaction Batch, the data appears in the rows of the batch data entry screen and on the Review transaction details screen.

Note: When you open an uncommitted batch, you view details about the data in the transactions and you select the information to use to create or update records in your database. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.

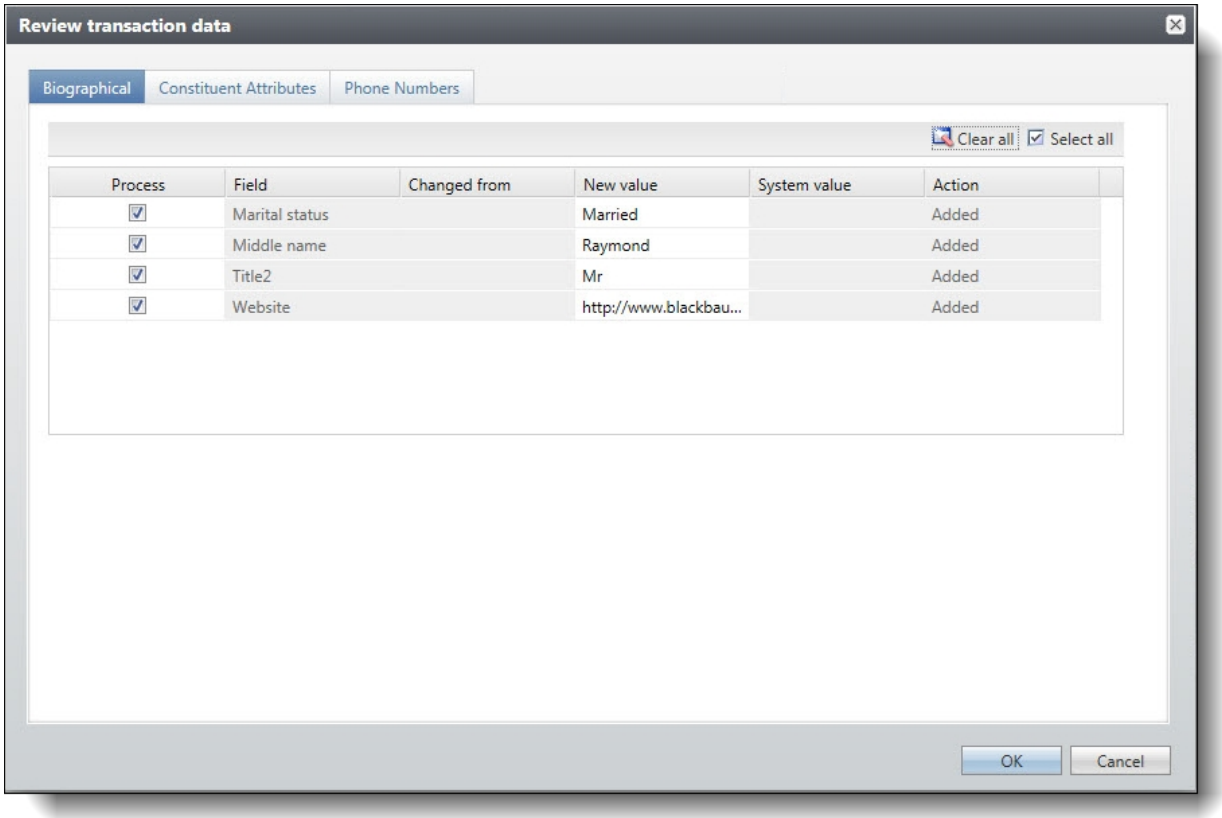


To view transaction detail information, select the transaction on the batch data entry screen and click **Review transaction details** on the toolbar. A screen appears and displays information about the transaction. The tabs that appear depend on the profile sections you include on your profile web page and the information a website user completes in these sections. For example, when you include the biographical, constituent attributes, and phone number sections on the web page and a website user submits information for all three sections, the Biographical, Constituent Attributes, and Phone Numbers tabs appear.



BBIS Profile Update Batch Tabs

When you review transaction details for a profile update transaction from ***Blackbaud Internet Solutions***, most tabs appear with basic functionality so you can easily click through the tabs to make sure you want to download the data to the constituent record. For example, the Biographical tab includes a **Process** checkbox for you to clear if you do not want to download the data to the constituent record and the **New value** column is enabled so you can add, edit, or remove data the constituent submitted on your website.



To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes on the tab, click **Clear All**.

The **Field** column is disabled and displays the fields from the applicable form on your website.

The **Changed from** column is disabled and displays the information for the field before the website user updated the profile.

The **New value** column displays the data that users submit in the fields. You can edit entries in this column as necessary, such as to correct misspelled words or edit formats to meet your organization's data entry standards.

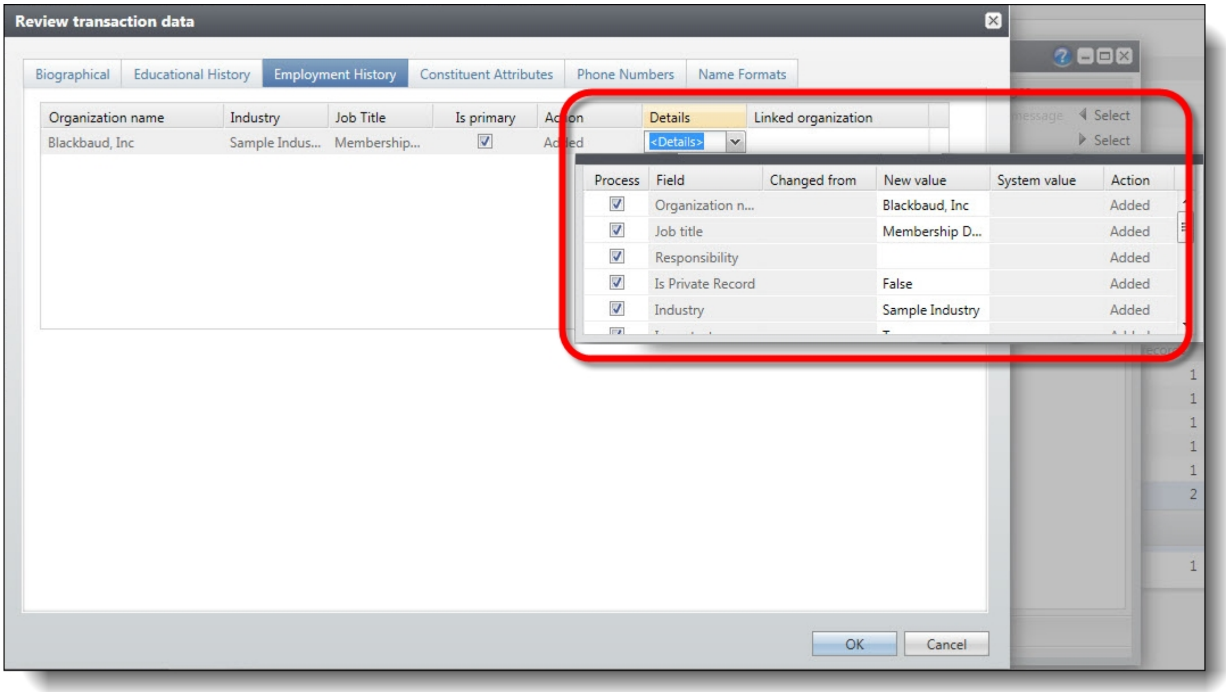
If the website user is linked to a constituent record in your database, the **System value** column displays the applicable information that already exists on the constituent record so you can compare it to the downloaded information.

Note: Data in the **Changed from** and **System value** columns is typically the same. However, it is different when a website user updates a field on the profile page and you update the same field on the website user's constituent record in ***Blackbaud CRM*** before you download the profile update transaction into a batch. For example, a website user logs into your website, changes the **Nickname** field, and submits the profile update. Before the transaction downloads into a batch, you change the **Nickname** field on the constituent record. After the profile transaction downloads into an uncommitted batch, the **Changed from** column displays the nickname that appeared on the profile page before the website user updated the profile, and the **System value** column displays the current data on the constituent record.

In the **Action** column, you can view whether the site user added or updated the information on your website.

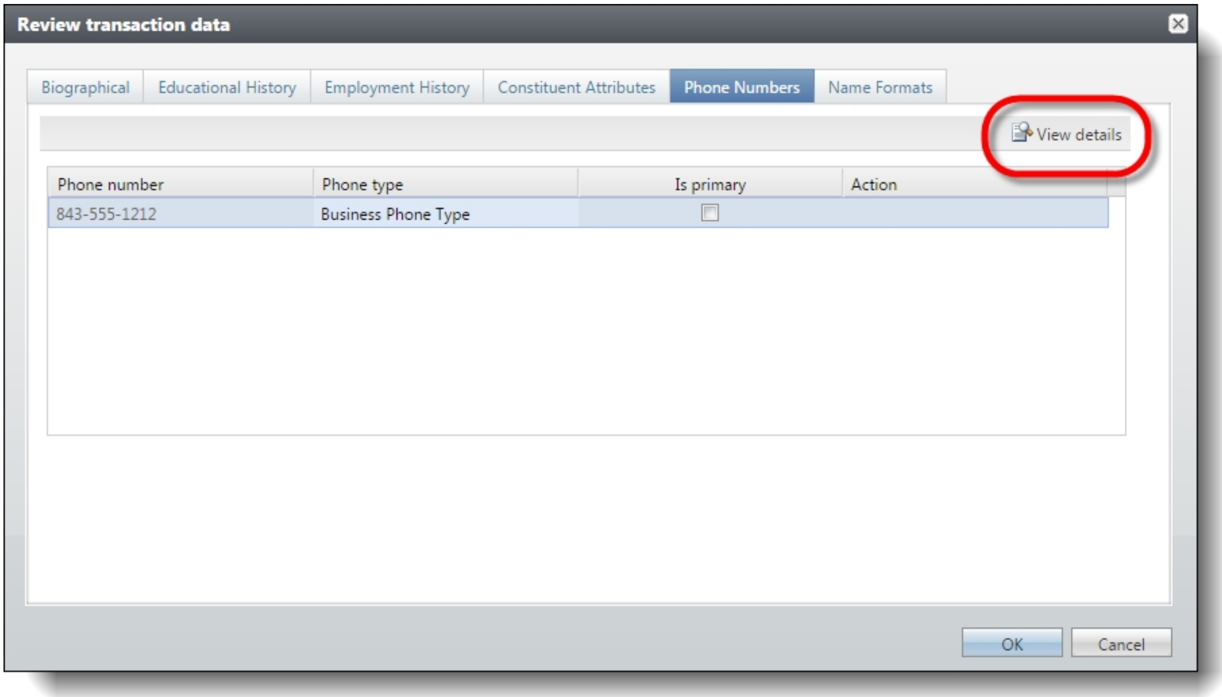
- If the information is new, the site user is new, or the site user accesses the form without first logging in to your website, "Added" indicates that the site user added this information.
- If the site user logs in to your website and updates information that automatically appears on the form, "Changed" indicates that the information contains updated data.

Some tabs include additional features. For example, the Employment History tab includes a **Details** column. In this column row, click the down arrow to view additional data you can process for the tab.

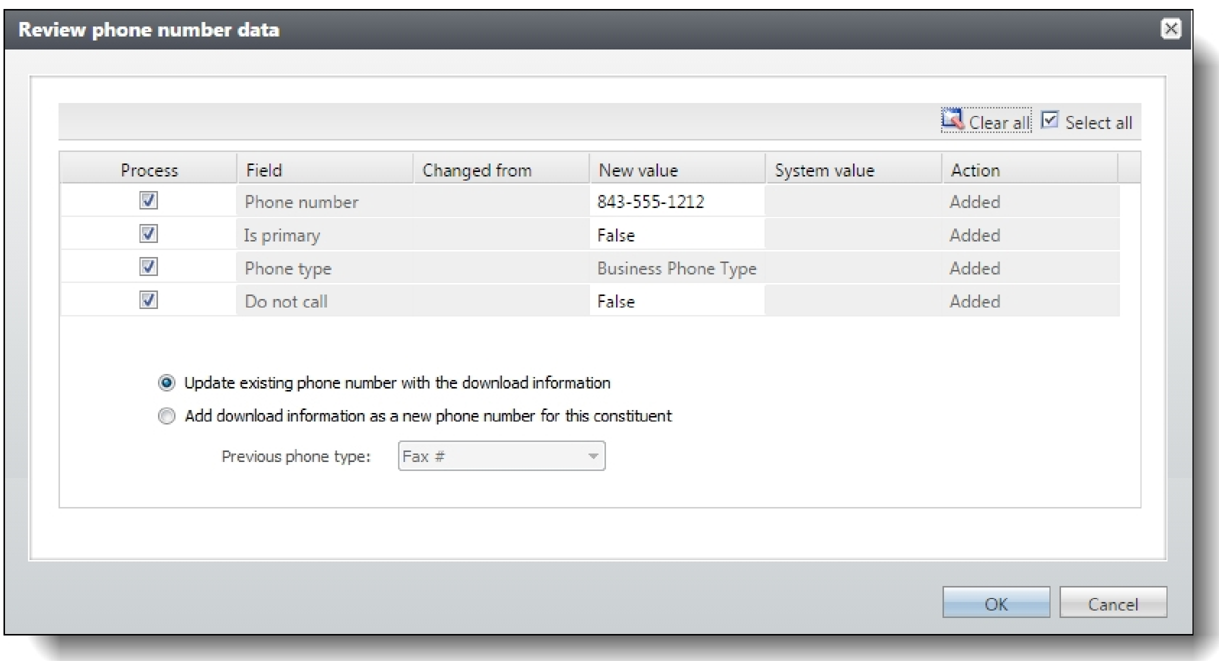


> ***Tip:*** The Educational History and Name Formats tabs are examples of other tabs that include the **Details** column.

Some tabs, for example the Phone Numbers tab, include a **View details** button.



To change information, click the button on the top right corner of the tab. The Review screen appears.



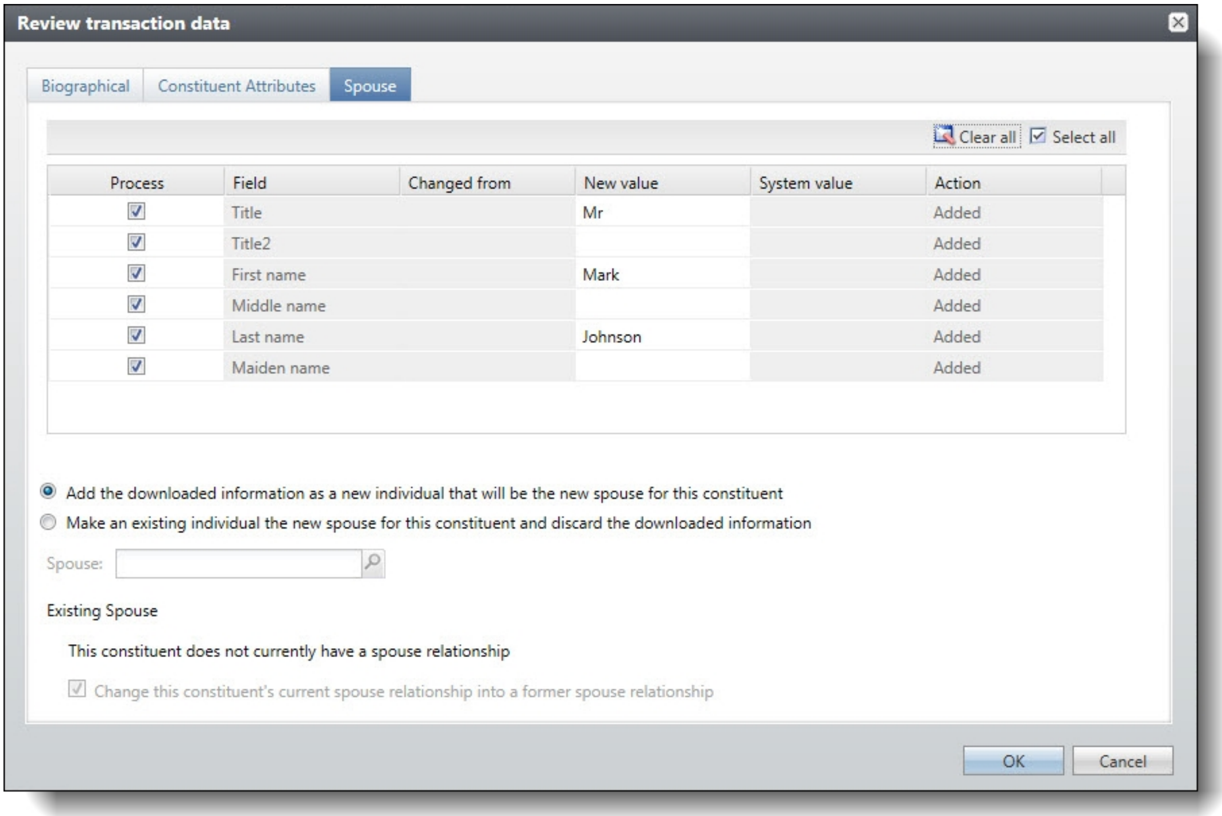
In addition to the grid, several options appear for you to decide how to process the data when the website user is linked to a constituent record.

- To update the constituent's existing phone with the information, select **Update existing phone number with the downloaded information**.

- To create a new phone type for the constituent with the information, select **Add downloaded information as a new phone for this constituent**. In the **Previous phone type** field, select the type to assign the existing primary phone information.

Tip: The Addresses and Email Addresses tabs are examples of other tabs that include the **View details** button.

The Spouse tab includes options so you can specify how you want to download the information.



- To use the information to simply update the constituent's spouse information, select **Update the existing spouse with the downloaded information**.
- To use the information to create a record of a new individual who will be a new spouse for the constituent, select **Add the downloaded information as a new individual that will be the new spouse for this constituent**.
- To discard the information and create a spouse relationship for the constituent with an existing individual, select **Make an existing individual the new spouse for this constituent and discard the downloaded information**. In the **Spouse** field, click the binoculars and use the Individual Search screen to search for the individual.

Warning: You should attempt to link every spouse you download to an existing record. If you do not verify whether each spouse is already a constituent, you can create duplicate records in your database.

Under **Existing spouse**, you can view whether the constituent already has a spouse relationship. If a spouse relationship exists and you select **Update the existing spouse with the downloaded**

information, specify whether to change the current spouse into a former spouse relationship. For example, if the user enters information about a new spouse, you can create a new a spouse relationship and make the existing spouse a former spouse. To create a former spouse relationship with the existing spouse information, select **Change this constituent's current spouse relationship into a former spouse relationship**. When you commit the user profile update transaction, the current spouse relationship changes to the removed spouse relationship type, as configured by the system administrator.

Note: If the constituent has an existing spouse relationship and you select **Add the downloaded information as a new individual that will be the new spouse for this constituent** or **Make an existing individual the new spouse for this constituent and discard the downloaded information**, the **Change this constituent's current spouse relationship into a former spouse relationship** checkbox is automatically selected and disabled.

Assign Constituent Information to a Security Group

From a BBIS Profile Update Transaction Batch or BBIS Event Registration Transaction Batch, you can assign the constituent information in a transaction to a security group. When you assign constituent information to a security group, only users in that group can access and manage the constituent records created with the transaction information. To assign constituent information to a security group, select the transaction row on the batch data entry screen and click **Set up security** on the toolbar. The Set up security for created constituents screen appears.

Assign constituent information to a security group

1. On the batch data entry screen, select the row of the transaction with information to assign to a security group.

2. On the toolbar, under **Details**, click **Set up security**. The Set up security for created constituents screen appears.

3. In each field, select the security group authorized to manage the constituent record created with the information. The system administrator configures the selections available. The fields that appear depend on the selected transaction type.

Note: If the selected transaction does not contain information that will create a type of constituent record, the field for that constituent information type is disabled.

- For an event registration transaction, the **Donor** and **Guest** fields appear.
- For a user profile update transaction, the **Spouse** field appears.

4. To save changes and return to the batch data entry screen, click **OK**.

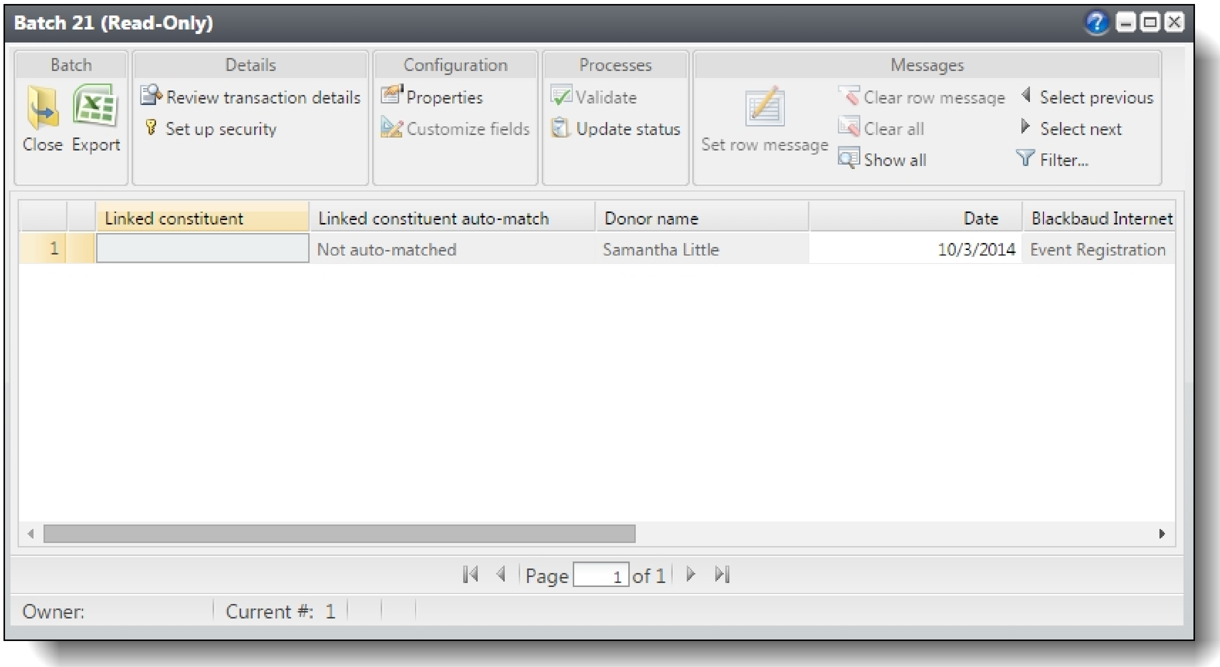
BBIS Event Registration Transaction Batch

Web event registration transactions from your ***Blackbaud Internet Solutions*** website download into the BBIS Event Registration Transaction Batch type. When you open an uncommitted BBIS Event Registration Transaction Batch, the data appears directly in the rows of the batch data entry screen.

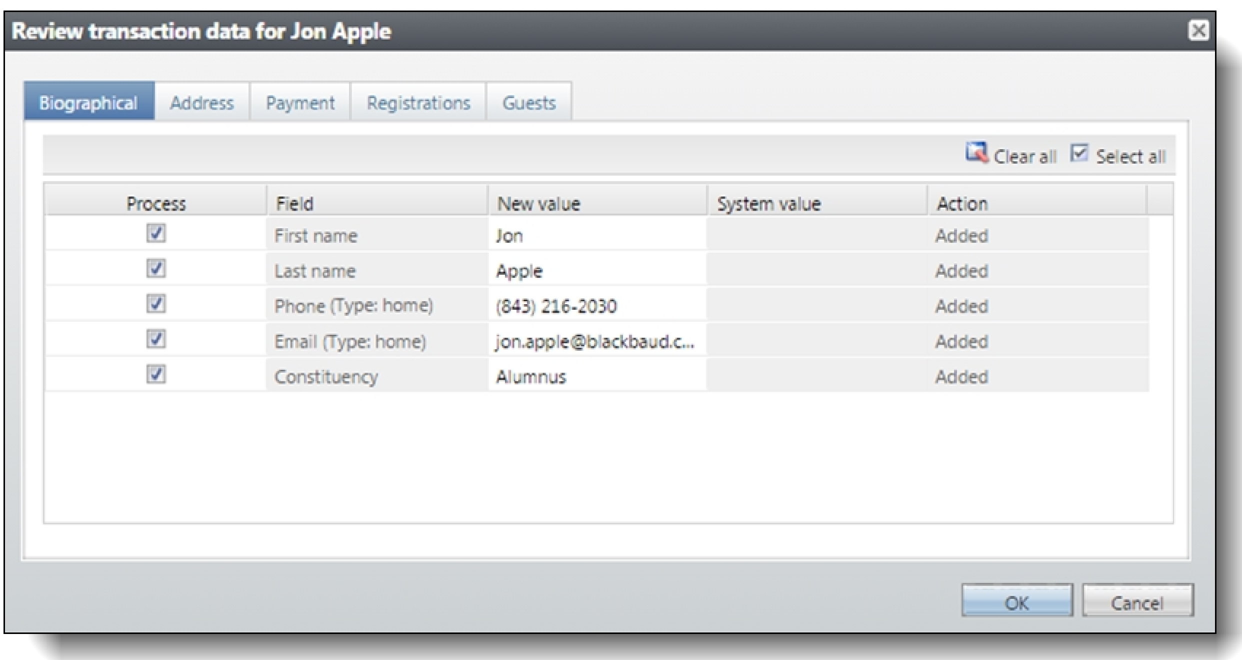
The program uses the following logic to process event registration transactions:

- When there are multiple registrants and the selected registration options total to $0, such as for free events, the first registrant is considered the donor.
- When there are multiple registrants and the selected registration options total to greater than $0, the donor is determined by which registrant's address has **Use this as my billing information** selected.

Note: When you open an uncommitted batch, you view details about the data in the transactions and you select the information to use to create or update records in your database. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.



To view transaction detail information, select the transaction on the batch data entry screen and click **Review transaction details** on the toolbar. A screen appears and displays information about the transaction. The tabs that appear contain the event registration data that the website user completed on your website. For example, the Biographical, Payment, and Registration tabs appear.



Tip: From a BBIS Profile Update Transaction Batch or BBIS Event Registration Transaction Batch, you can assign the constituent information in a transaction to a security group. When you assign constituent information to a security group, only users in that group can access and manage the constituent records created with the transactions. For more information about security groups, refer to Assign Constituent Information to a Security Group on page 54.

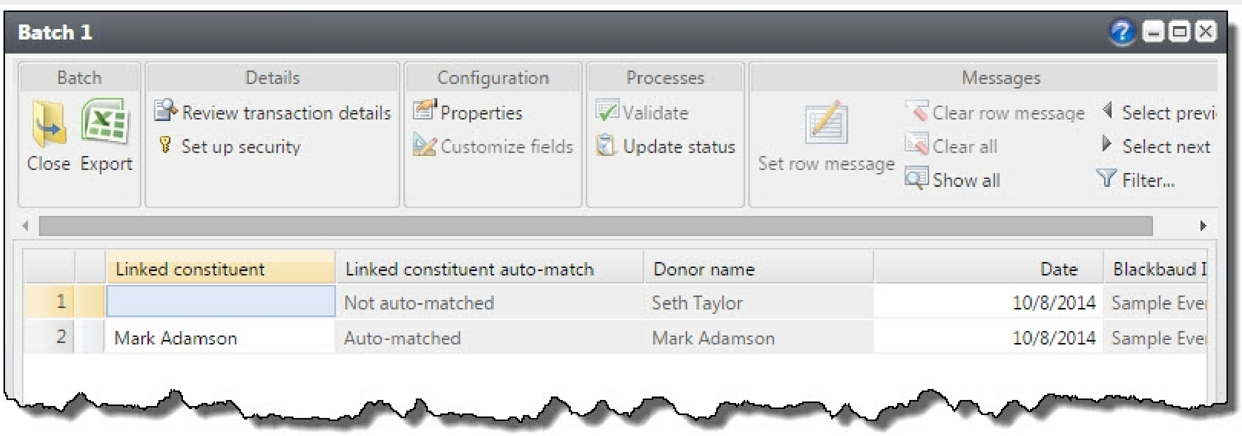
Link an Event Registrant Website User to a Constituent

When you download event registration information from your website, you can link the website user to an existing constituent to help prevent duplicate constituents in your database. When you link the user to a constituent, you can compare the download information to existing information and determine whether to add new information or update existing data accordingly.

Link an event registrant website user to a constituent

1. On the batch data entry screen, the **Linked constituent** column displays the constituent name when “Auto-matched” appears in the **auto-match** column.

Tip: The program automatically attempts to match event registrant website users to constituents in your database based on the auto-match fields selected on the Auto-match tab of the **Configure integration** task. You should attempt to link every website user you download to make sure your constituent information is current and help prevent duplicate constituents in the database. For more information about the Auto-match tab, refer to Configure integration - Auto-match tab on page 18.



When the program does not find a match, “Not auto-matched” appears in the **auto-match** column.

a. To make sure a constituent record does exist for the website user, click **Review transaction details** on the toolbar.

b. In the **Registrant** column, select “Linked constituent.”

c. In the **Linked constituent** column, click the binoculars and use the search screen to search for the constituent.

   For more information about tabs in a BBIS Event Registration Transaction Batch, refer to BBIS Event Registration Transaction Tabs on page 58.

When the program finds multiple possible matches, “Multiple matches found” appears in the **auto-match** column.

a. To match the correct constituent with the website user, in the **Linked constituent** column, click the binoculars. The search screen appears and defaults the website user's last name and first name.

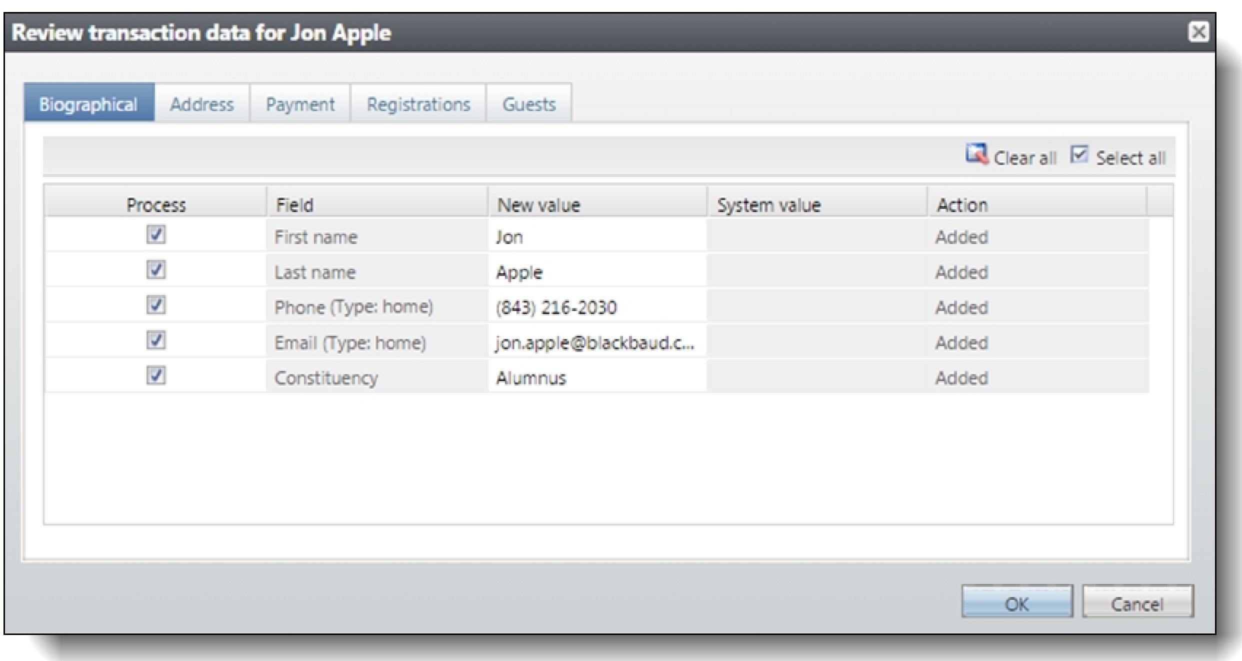
b. Click **Search**. Under **Results**, the multiple matching constituent names appear.

c. Select the name that matches the website user. The program automatically returns to the batch data entry screen and the name appears in the **Linked constituent** column.

2. To view transaction detail information, select the event registrant row and click **Review transaction details** on the toolbar. A screen appears and displays information about the transaction. For more information about these tabs, refer to BBIS Event Registration Transaction Tabs on page 58.

BBIS Event Registration Transaction Tabs

When you review transaction details for an event registration from ***Blackbaud Internet Solutions***, most tabs appear with basic functionality so you can easily click through the tabs to make sure you want to download the data to the constituent record. For example, the Biographical tab includes a **Process** checkbox for you to clear if you do not want to download the data to the constituent record and the **New value** column is enabled so you can add, edit, or remove data the constituent submitted on your website.



To select all **Process** checkboxes, click **Select All**. To clear all **Process** checkboxes on the tab, click **Clear All**.

The **Field** column is disabled and displays the fields from the form on your website.

Note: When the event registration form includes **Phone** and **Address** fields, the website user's phone type defaults to the address type when **Use this as my billing information** is selected. When a website user does not select **Use this as my billing information**, the transaction data does not include a phone type. After you commit the BBIS Event Registration Batch, you can add a phone type to the corresponding constituent record in Blackbaud CRM.

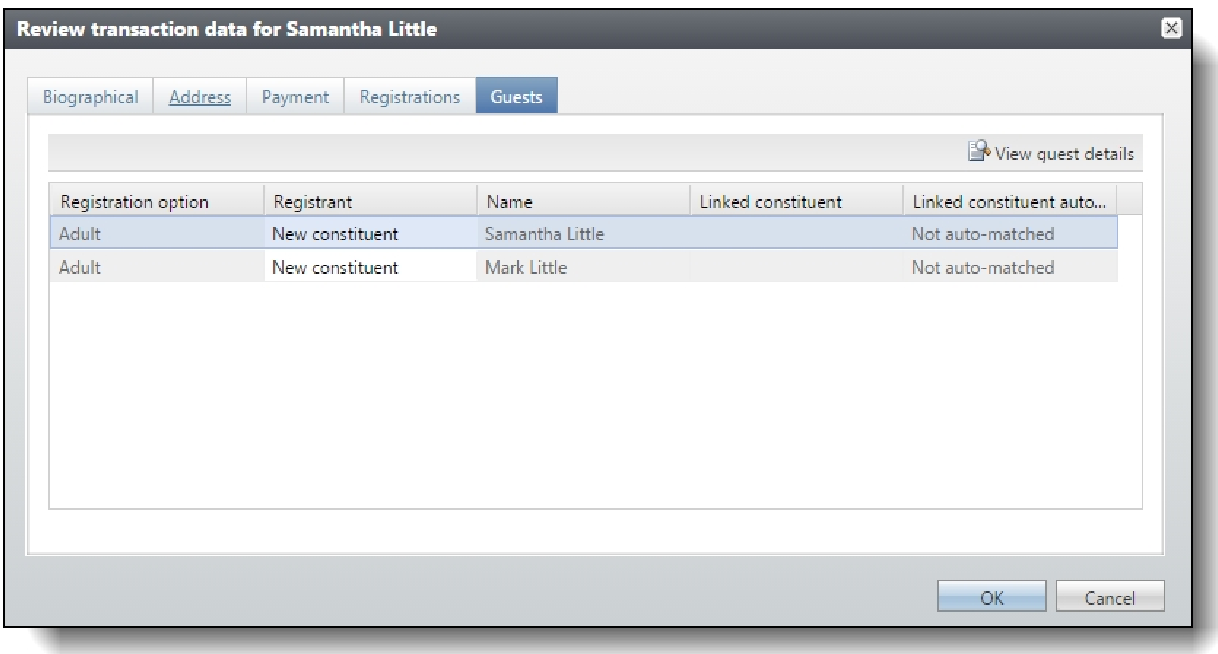
The **New value** column displays the data that users submit in the fields. You can edit entries in this column as necessary, such as to correct misspelled words or edit formats to meet your organization's data entry standards.

If the website user is linked to a constituent record in your database, the **System value** column displays the applicable information that already exists on the constituent record so you can compare it to the downloaded information.

In the **Action** column, you can view whether the site user added or updated the information on your website.

- If the information is new, the site user is new, or the site user accesses the form without first logging in to your website, "Added" indicates that the site user added this information.
- If the site user logs in to your website and updates information that automatically appears on the form, "Changed" indicates that the information contains updated data.

Some tabs include additional features. For example, the Guests tab includes a **Registrant** column and a **View guest details** button.



In the **Registration option** column, you can view the registration or pricing option selected for each participant included in the registration. In the **Registrant** column, you can view the status given to each participant. You can also update the status for each participant as necessary.

- In ***Blackbaud Internet Solutions***, you can select to display the individual relationships of a registrant who logs into the event registration page as available participants. If you enable this option and the registrant selects a constituent from your database, “Linked constituent” appears in the **Registrant** column. In the **Linked constituent** column, the name of the linked constituent appears.

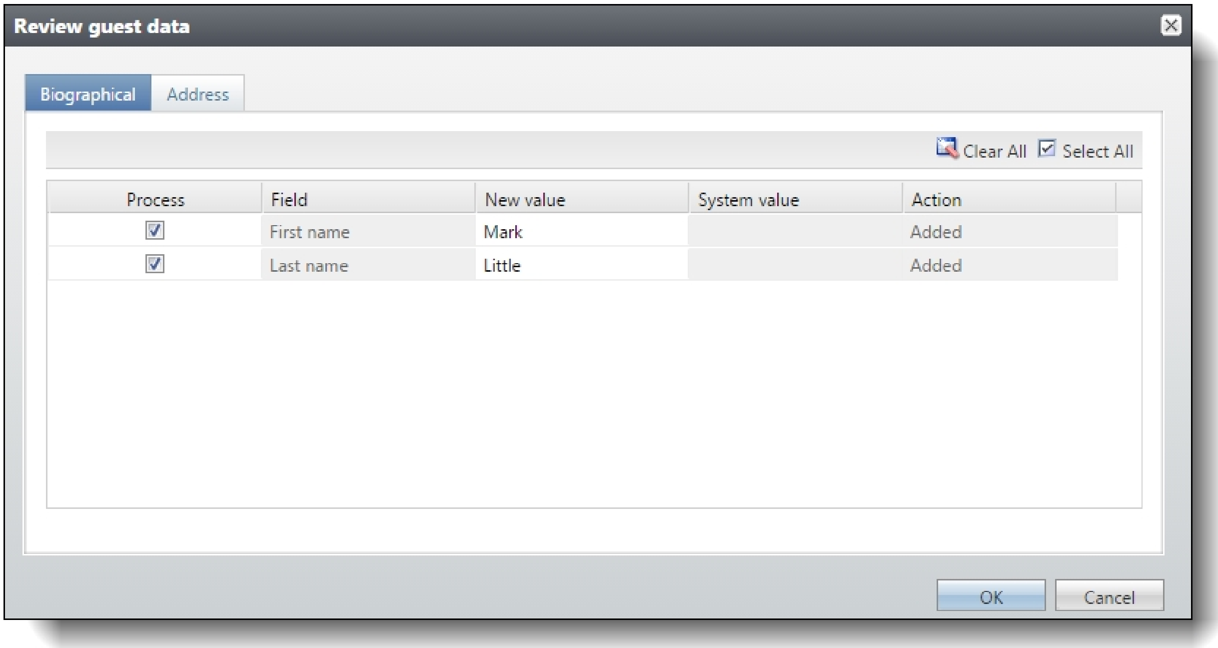
- If the guest is not linked to a constituent and is not the donor or an unknown guest, “New constituent” appears. When you commit the batch, a new constituent record is created for this guest as well as a guest registrant.

When the guest appears as a new constituent, you can try to link the guest to a constituent using the name in the **Name** column. In the **Registrant** column, select “Linked constituent” and tab to the **Linked constituent** column. In the **Linked constituent** column, click the binoculars and use the Constituent Search screen to search for the constituent. If the guest is not already a constituent and you download a name with the guest, select “New constituent” in the **Registrant** column.

Warning: You should attempt to link every guest you download to a constituent. If you do not verify whether each guest is already a constituent, you can create duplicate constituents in your database.

- If, on your website, the registrant selects “Not sure” for the **Registrant** field on the Event Registration form, such as for a guest to be determined later, “Unknown guest” appears in the **Registrant** column. When you commit the batch, an new unknown guest record for the constituent is created.
- When you download an event registration with guest information, the program automatically attempts to match the guests to constituents in your database, based on the auto-match fields selected when your system administrator configures the integration. If the program finds a possible match, the constituent name appears in the **Linked constituent** column and “Auto-matched” appears in the **Linked constituent automatch** column. If the program finds multiple possible matches, “Multiple matches found” appears. If the program does not find a match, “Not auto-matched” appears.

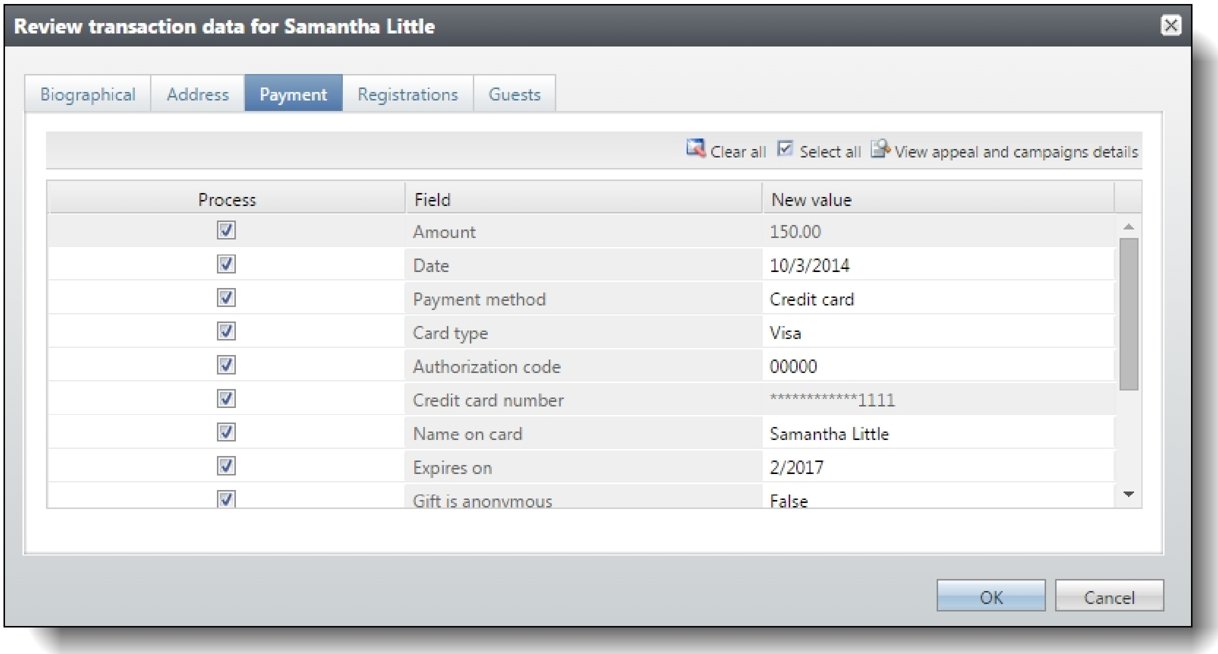
From this tab, you can also view the detail information entered about the guests on the event registration form of your website. Select the guest’s row on the Guests tab and click the **Review guest details** button. The Review guest data screen appears.



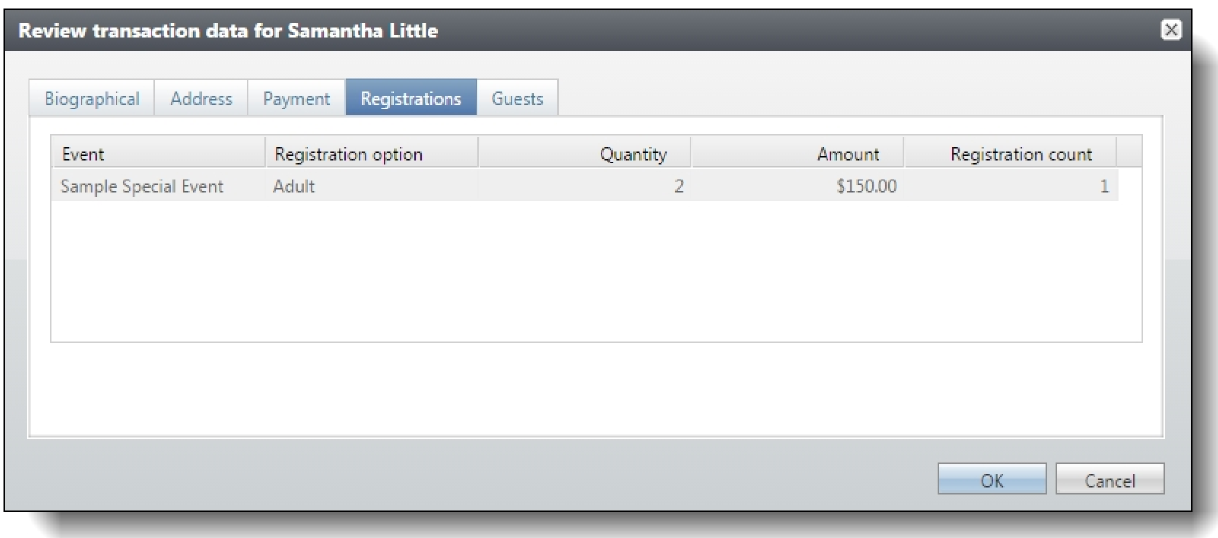
To help navigate through the information, the Review guest data screen may contain the Biographical tab, Address tab, and Attributes tab. The information that appears depends on the information that the website user entered for the guest on the event registration form of your website.

Note: You cannot view a Review guest data screen about a participant on the Guests tab with a **Registrant** status of “Donor.” For detail information about the donor, refer to the Biographical and Address tabs of the Review transaction data screen of the event registration.

Other tabs that appear for event registration transactions are unique to the BBIS Event Registration Transaction template. For example, the Payment tab displays the payment information that the website user enters on the event registration web page. To modify the appeals and campaigns that are associated with event registration payments, click **View appeal and campaigns details**.

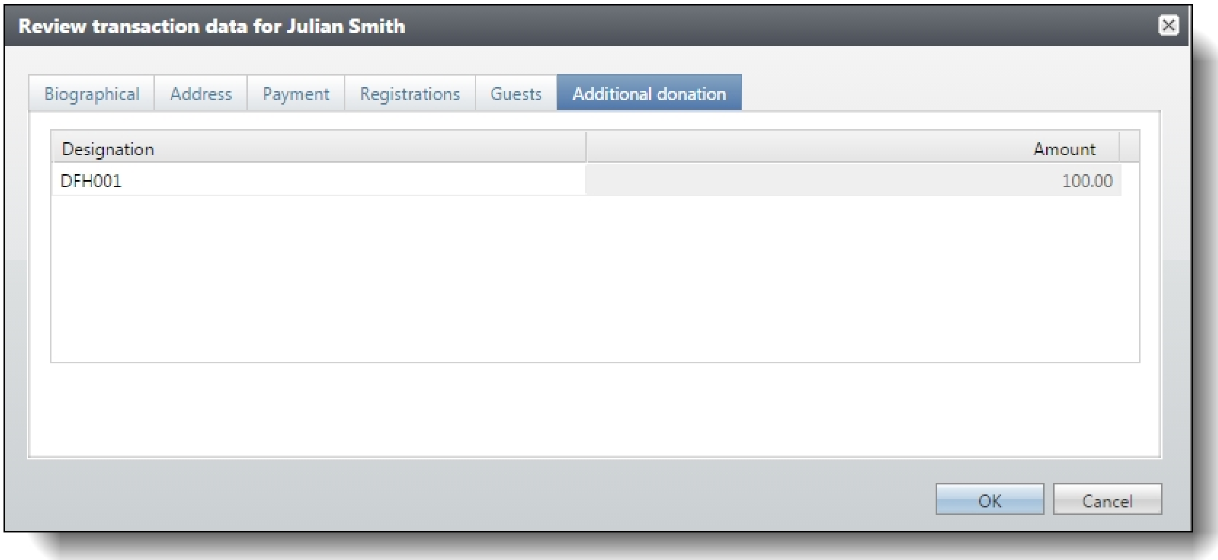


The Registrations tab displays the event information that the registrant enters on the event registration form, including the events that the participant registers for, the registration options selected, the quantity and cost of each registration option, and the registration count. You cannot edit the information on this tab.



Warning: When you define the number of participants for each pricing option on the Event Registration Form part on the website, we recommend you enter the same number of participants defined for the corresponding registration option in the program.

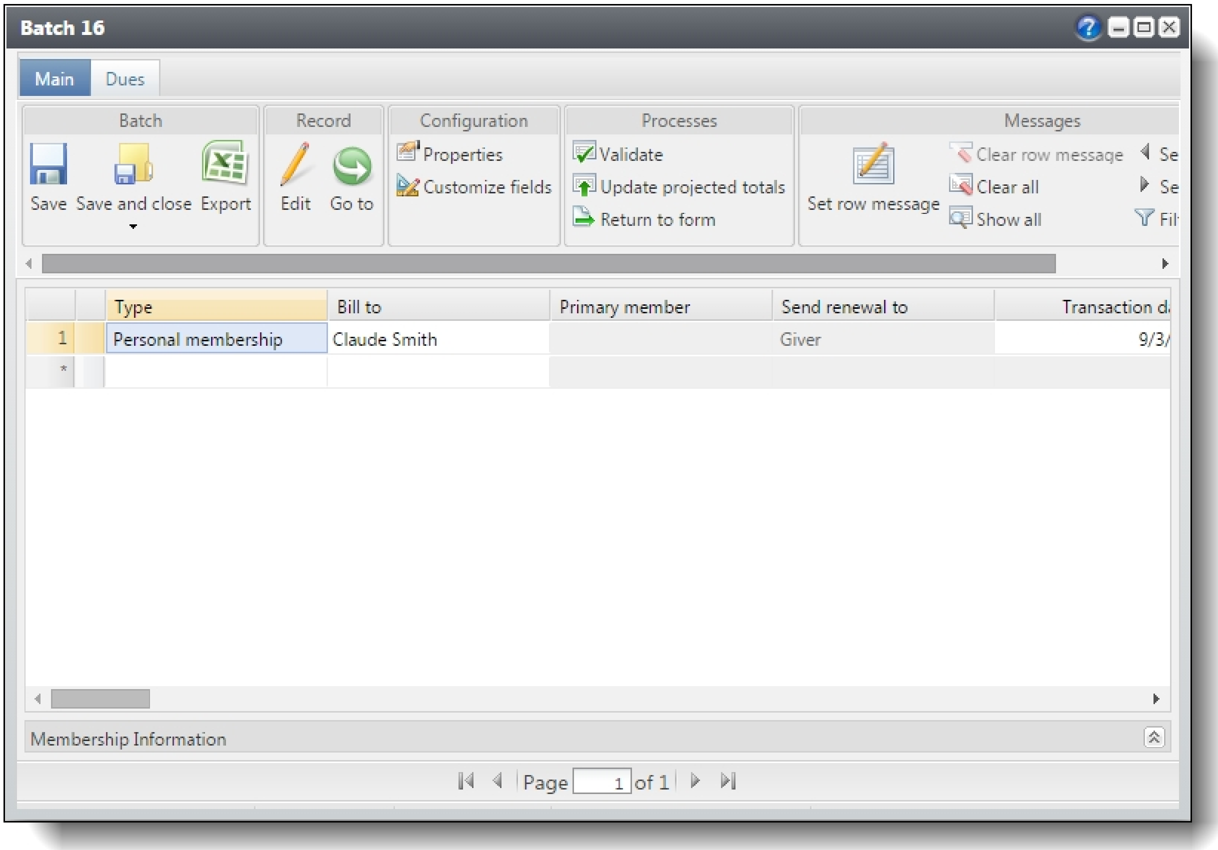
The Additional Donation tab appears when you include this option on the Event Registration Form part in ***Blackbaud Internet Solutions*** and the website user selects to make an additional donation when registering for the event on your website. On this tab, you can view the designation and amount the user entered on the payment page.



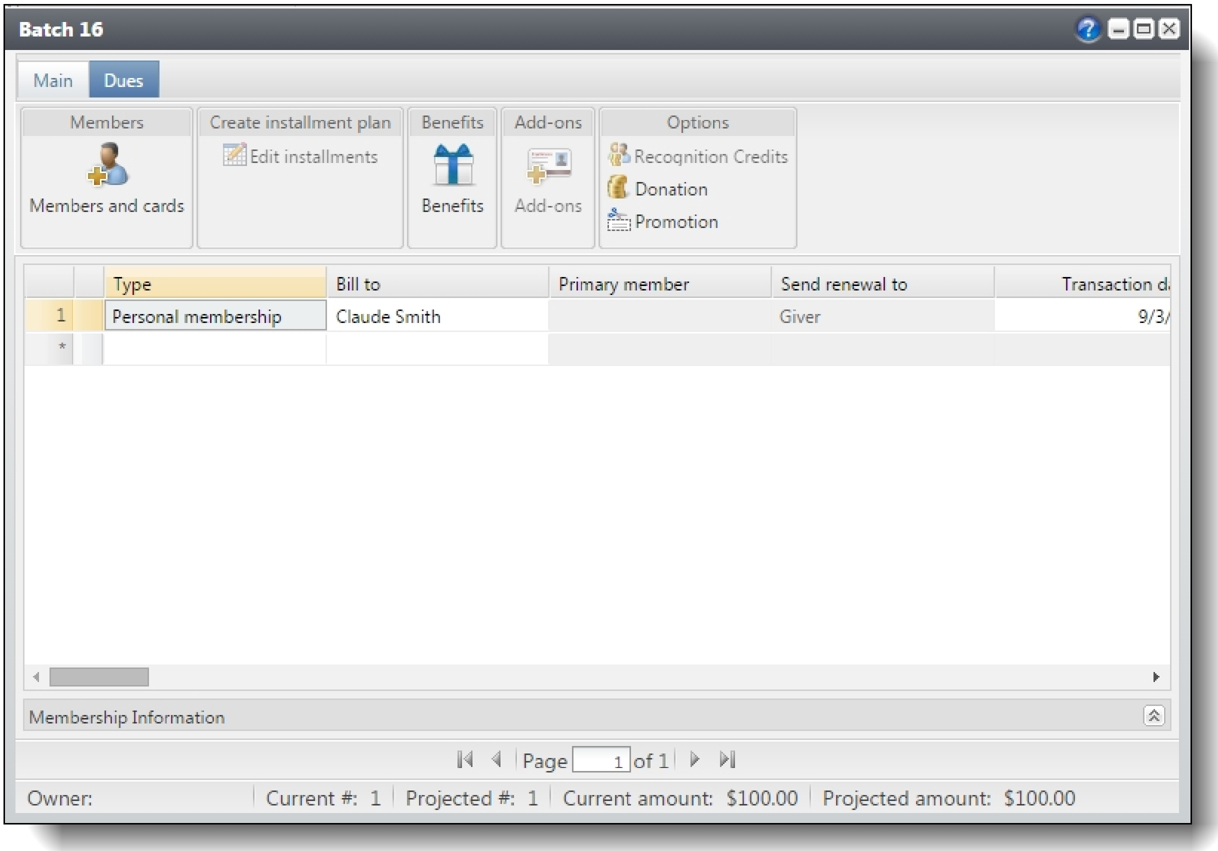
Membership Dues Batch

Website membership transactions from your ***Blackbaud Internet Solutions*** website download into the Membership Dues Batch type. When you open an uncommitted Membership Dues Batch, the data appears directly in the rows of the batch data entry screen and on the Dues tab.

Note: When you open an uncommitted batch, you view details about the data in the transactions and you select the information to use to create or update records in your database. For information about uncommitted batches, refer to Edit an uncommitted web transaction batch on page 26.

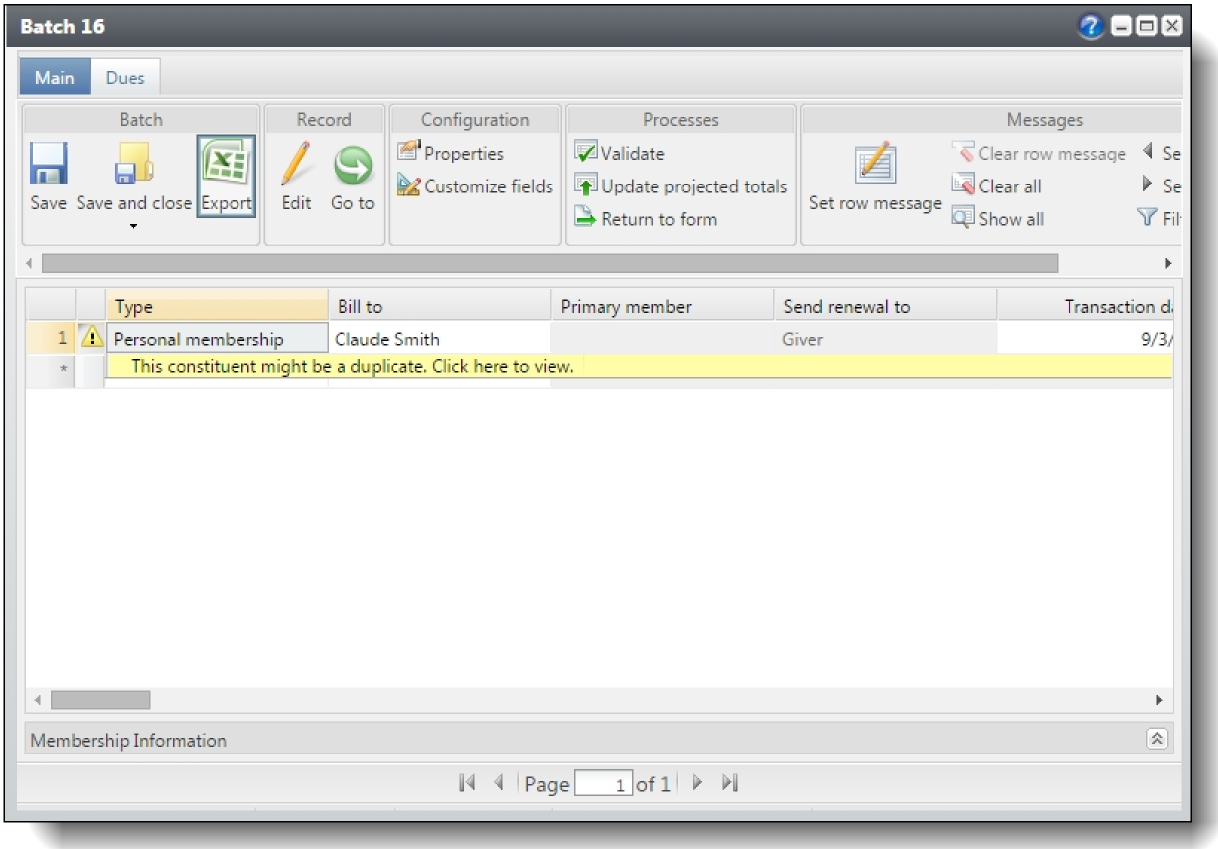


To view transaction detail information, select the Dues tab and then select then select the transaction on the batch data entry screen.



From the action bar on this tab, you can manage additional membership data. For example,you can add membership cards, edit installments, add or edit benefits, and you can add an additional donation.

When you validate a Membership Dues Batch, the program automatically runs a duplicate check to find any existing constituents that may match constituents in the batch. When the match confidence score for a pair of constituents falls within the range defined for possible matches, the program flags the incoming record as a potential duplicate and displays an exception in the batch data entry grid.



To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record. For information about the duplicate resolution screen, refer to the *Batch and Import Guide*.

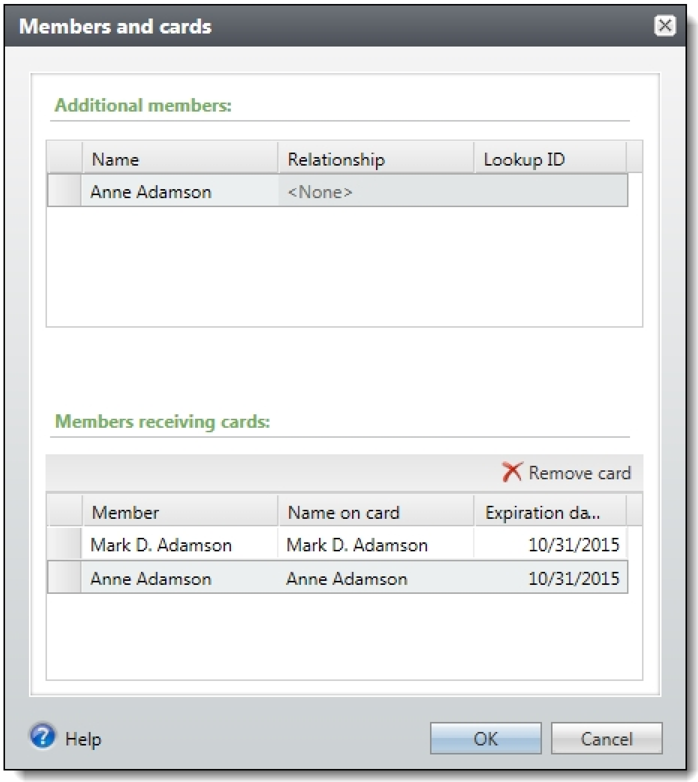
Manage Members and Membership Cards in a Membership Dues Batch

If the membership program and level allow multiple members, you can manage the members and membership cards to include from a membership dues batch.

On the Additional members screen, search for and select the constituents, by name or lookup ID, to include as members. After you select the members to include, click **OK** to return to the batch data entry screen.

Manage members and membership cards

1. On the batch data entry screen, select the membership with the members or membership cards to manage.
2. On the Dues tab, click **Members and cards** under **Members** on the ribbon bar. The Members and cards screen appears.



3. Under **Additional members**, specify the constituents to include as members. You can select constituent relationships of the primary member, or you can search for and select constituents as necessary.
4. Under **Members receiving cards**, select which members receive membership cards if the membership level includes multiple cards. For each member selected, enter the name and expiration date to appear on the card.

Note: If you add the wrong constituent to the grid, you can select the row and click **Remove card**.

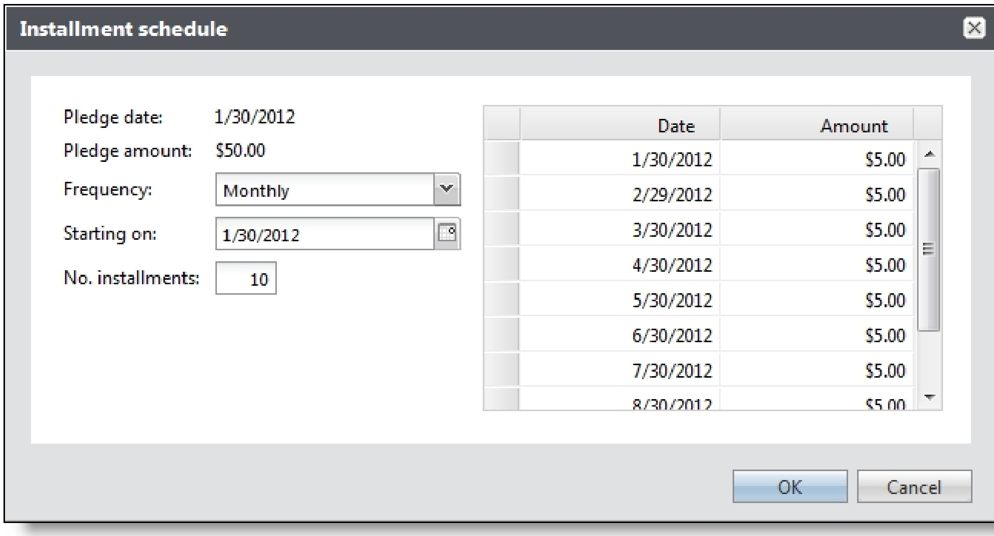
5. Click **OK**. You return to the batch data entry screen.

Edit Pledge Installments in a Membership Dues Batch

Your organization may allow members to pledge dues for specific membership programs. From a membership dues batch, you can set up the installment schedule for a pledged membership.

Edit the installment schedule for a pledged membership

1. On the batch data entry screen, select the pledged membership with the installment schedule to edit.
2. On the Dues tab, click **Edit installments** under **Pledge** on the ribbon bar. The Installment schedule screen appears.



Note: The **Pledge date** and **Pledge amount** fields display the transaction date and amount for the membership. To adjust the date or amount of the pledge, edit the membership information in the batch.

3. In the **Frequency** field, select the frequency of the installments, such as Monthly or Quarterly.
4. In the **Starting on** field, select the due date of the first installment.
5. In the **No. installments** field, enter the total number of installments into which to divide the pledge.
6. In the grid, the regular installment schedule, based on the entered frequency, start date, and installment number, appears. To set up an irregular installment, such as if the member requests to skip a month, edit the grid as necessary.
7. Click **OK**. You return to the batch data entry screen.

Manage Benefits in a Membership Dues Batch

From a membership dues batch, you can manage the benefits the constituent receives in response to a membership transaction. For example, your organization may offer items such as t-shirts, coffee mugs, or stickers as incentives for memberships. If a membership program level has benefits associated with it, the member will receive those benefits by default.

Tip: If the selected membership program and level assign benefits based on the number of members, the default quantity of benefits received for a transaction matches the maximum number of members allowed for the selected level. For example, if you add a transaction that includes three members and select a level that allows up to four members, the transaction receives benefits for four members. You can edit the quantity of benefits associated with the transaction as necessary.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership, for an additional cost or not depending on the item.

Manage benefits for a membership in a dues batch

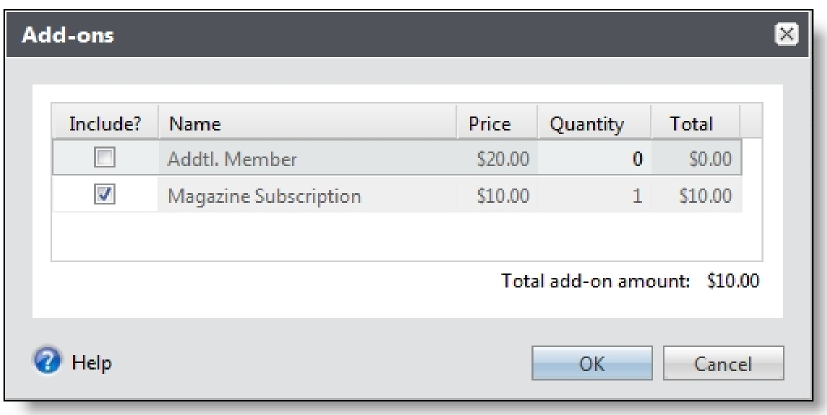
1. On the batch data entry screen, select the membership with the benefits to manage.
2. On the Dues tab, click **Benefits** on the ribbon bar. The Benefits screen appears.
3. In the grid, search for and select the benefits that the constituent receives for the membership transaction.
4. For each benefit, enter the quantity the constituent receives.The **Total fair market value** field displays the total value of the benefits received. The fair market value is set up when you manage benefits from the **Benefits catalog** in *Memberships*.
5. In the **Tax deductible amount** field, edit the tax-deductible value of the membership if necessary. By default, the tax deductible amount is the cost of the membership minus the monetary value of any membership-related benefits.

Tip: To quickly remove all tax-deductible benefits from the transaction, click **Remove tax deductible benefits**. To remove all benefits from the transaction, click **Remove all benefits**.

6. Click **OK**. You return to the batch data entry screen.

Manage Add-ons in a Membership Dues Batch

From a membership dues batch, you can manage the add-ons to include in membership transactions, such as guest passes. On the batch data entry screen, select the membership and then, on the Dues tab, click **Add-ons** on the ribbon bar. The Add-ons screen appears and displays the add-ons set up for the selected membership program.

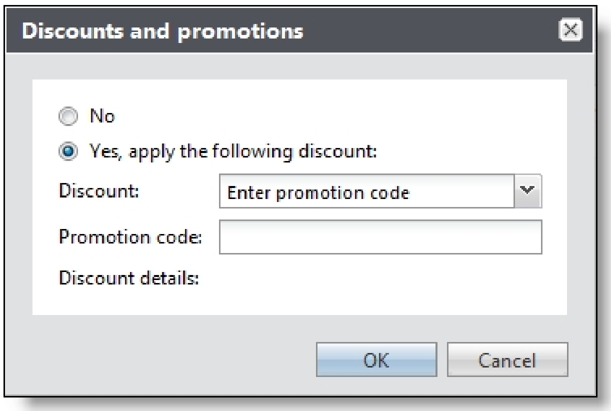


Select the add-ons to include in the transaction and enter the quantity of each to include. The **Total add-on amount** field displays the total additional cost of the selected add-ons. After you select the add-ons to include, click **OK** to return to the batch data entry screen.

Note: Add-ons and benefits are similar. Benefits are things like items members automatically receive with their memberships or membership levels. Add-ons are optional offerings members can "add on" to their membership—for an additional cost or not depending on the item.

Manage Promotions in a Membership Dues Batch

From a membership dues batch, you can manage discounts and promotions to apply toward membership transactions. For example, to increase membership enrollment, your organization may offer reduced dues for new memberships during a specific weekend. On the batch data entry screen, select the membership and then, on the Dues tab, click **Promotion** under **Options**.

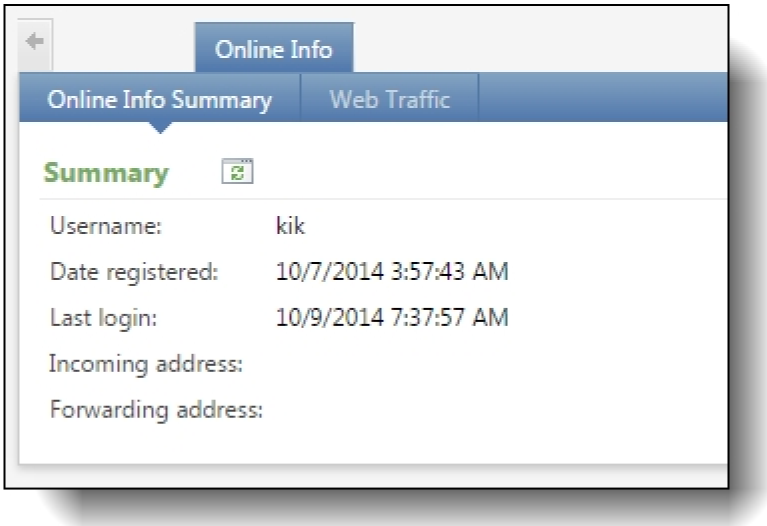


On the Membership Promotions screen, select whether to apply a discount to the membership transaction. If you select **Yes**, select the discount or enter the code of the promotion to apply. To return to the batch data entry screen, click **OK**.

Web Transaction Information on Records

After you download transactions from your website, you can view downloaded information on your constituent, revenue, and event registrant records.

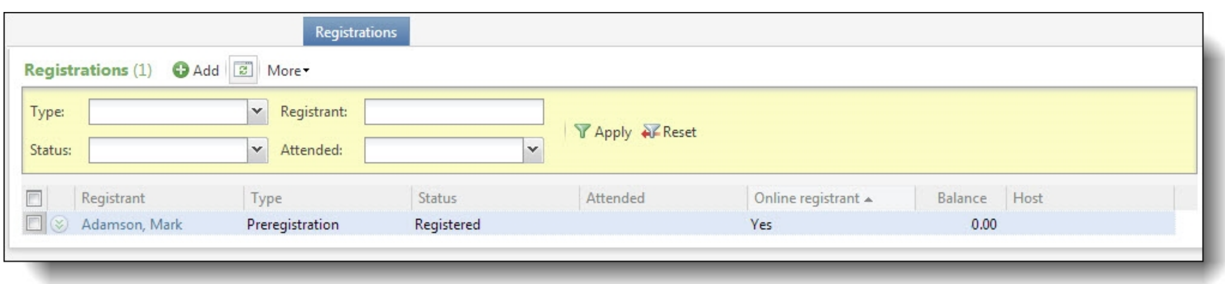
- When constituents are members of your website, you can view their online activity for your site on the Online information tab. For information, refer to the *Constituents Guide*.



- On event registrant records, you can view whether registrations were downloaded from your website. If participants registered online, you can view the web page where registrations occurred. For more information about website information on registrant pages, refer to Event Registrant Page on page 71.
- On revenue records for donations that you download from your website, you can view the batch that created the records and whether constituents clicked links in email to access the donation form. You can also view any comments that users submit with the donation. For more information about website information on revenue records, refer to Revenue Record on page 72.
- On constituent records, you can view survey response information on the Surveys tab. For more information, refer to Surveys Page on page 73.

Event Registrant Page

When you download and commit event registrations from your organization's website, the **Online registrant** column on the Registrations tab on the event record indicates whether the participant registered on your website. When the **Online registrant** field indicates the participant registered online, the **Web Transactions page** column of the Registrations tab displays the web page where the participant registered.

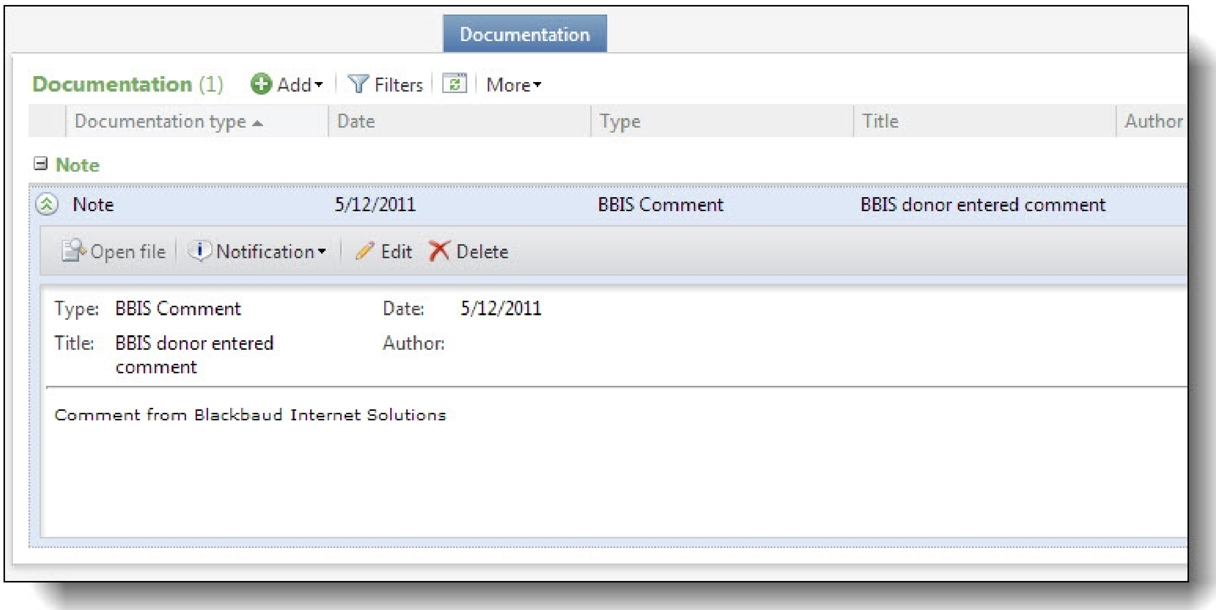


Note: For more information about the registrant page and its tabs, refer to the *Events Guide*.

Revenue Record

When a donor clicks a link in an email message to navigate to a donation page on your website, the **Inbound channel** field on the Details tab of the revenue record displays the value in the **Channel** field from **Web**, **Configuration integration**. For more information, refer to Configure integration - General tab on page 16.

The program also saves additional data from a donation transaction as a note on the Documentation tab of the revenue record. This data includes donation notes from website users, corporate gift information, matching gift information, tribute acknowledgee information, and updates to spouse information.



- For donation messages from website users, no action is necessary. Unless you delete the message, it is saved in the note and attached to the revenue record.

  > ***Note:*** Before you commit a batch with donation messages, you must either click **Save** on the Edit note screen for each the batch row that has an attached note or click **Clear all** under **Messages** on the Main tab to clear messages for the entire batch.

- For corporate gifts from organizations, after you commit the batch, you may want to check the organization record for a relationship to the individual who submitted the gift. If the individual is in your database but no relationship exists, you may want to add a relationship.
- For matching gifts, you can click **Matching gifts** under **Revenue details** on the Revenue tab of the batch data entry screen to create a matching gift record. If the matching organization is not already in your database and you have MatchFinder, you probably want to add the organization through MatchFinder before you enter gift information on the Add matching gift claims screen.
- For acknowledgee information, you can go to the tribute record after you commit the batch and manually add this information to the record.

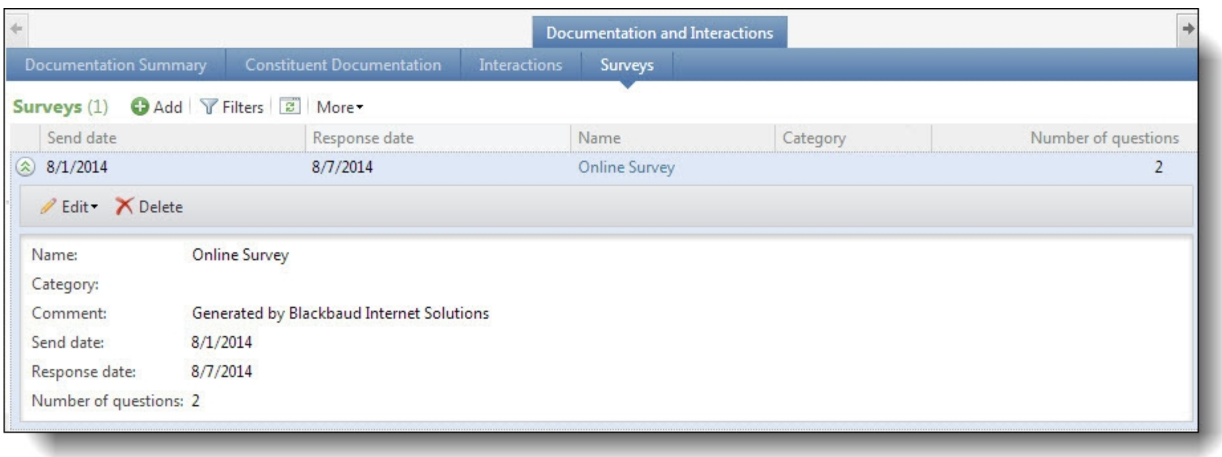
- For updates to spouse information, you can compare the information to the existing spouse information to determine whether to update the existing spouse or create a new spouse record. This avoids incorrectly overwriting existing data or creating duplicate records.

  Note: Before you commit a batch with spouse information, you must either click **Save** on the Edit note screen for each the batch row that has an attached note or click **Clear all** under **Messages** on the Main tab to clear messages for the entire batch.

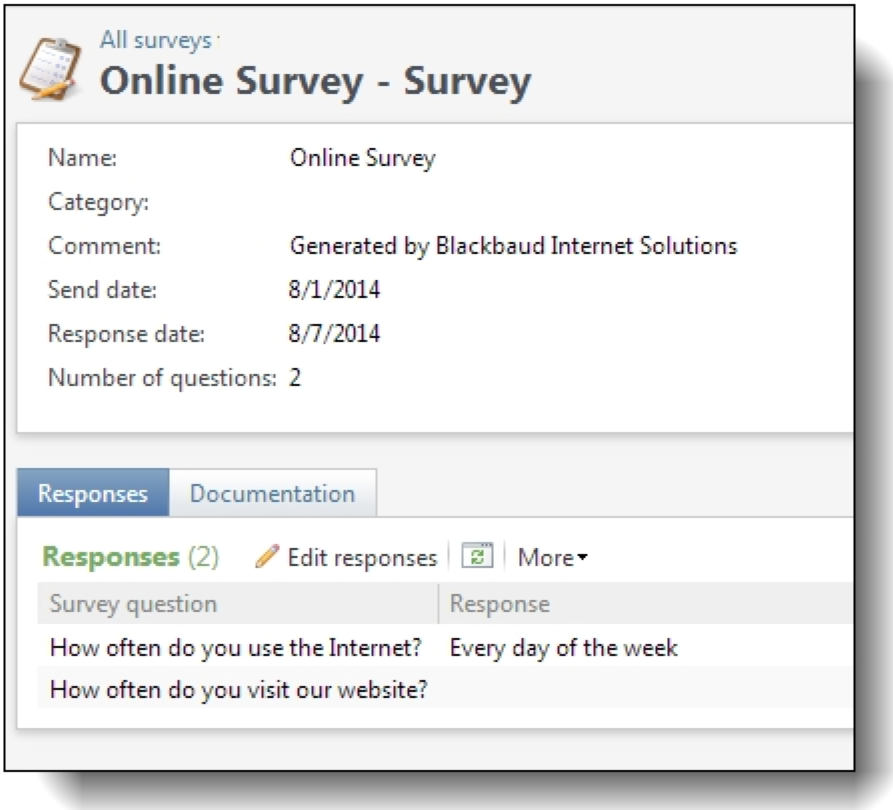
Note: For information about revenue records and the Documentation tab, refer to the *Revenue Guide*.

Surveys Page

When you download survey responses from your organization's website, the program automatically updates the Surveys tab of the constituents who participate in the survey with a record of their participation and their respective responses. To view survey information for a constituent, select the Documentation and Interactions tab and then select the Surveys tab. The **Comment** field displays "Generated by Blackbaud Internet Solutions."



To view the constituent's responses to a survey, click the name of the survey in the **Name** column. The Survey page appears and defaults to the Responses tab.



Note: For more information about the Surveys page for a constituent, refer to the *Constituents Guide*.