

# Upgrade Path for Web Transaction Batches

In **Blackbaud CRM 3.0**, the batch process has been improved for the donation and signup transactions that you download from your **Blackbaud Internet Solutions** website.

- For donations, the program now uses a batch template with the Enhanced Revenue Batch batch type instead of the BBIS Donation Transaction Batch batch type.
- For signups, the program now uses a batch template with the Constituent Update Batch batch type instead of the BBIS Signup Transaction Batch batch type.

This enhancement means that 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.

**Tip:** We recommend that before you upgrade from a version prior to **3.0**, you commit all uncommitted donation and signup batches. When you upgrade, the program stops downloads for web transactions, and you must delete any uncommitted donation or signup batches before you resume processing their transactions. Deleting the uncommitted batches does not lose any data from website users because the program returns the transactions to a pending download state. However, any edits that were made to data in the batches will be lost, so we recommend that you commit these uncommitted batches before the upgrade.

After the upgrade, the download process for web transactions is temporarily suspended because BBIS Donation Transaction Batch and BBIS Signup Batch are no longer valid batch types.

Since you can no longer process batches with these batch types, the first step after you upgrade is to delete all uncommitted donation and signup batches. This returns any transactions in those batches to a pending download state.

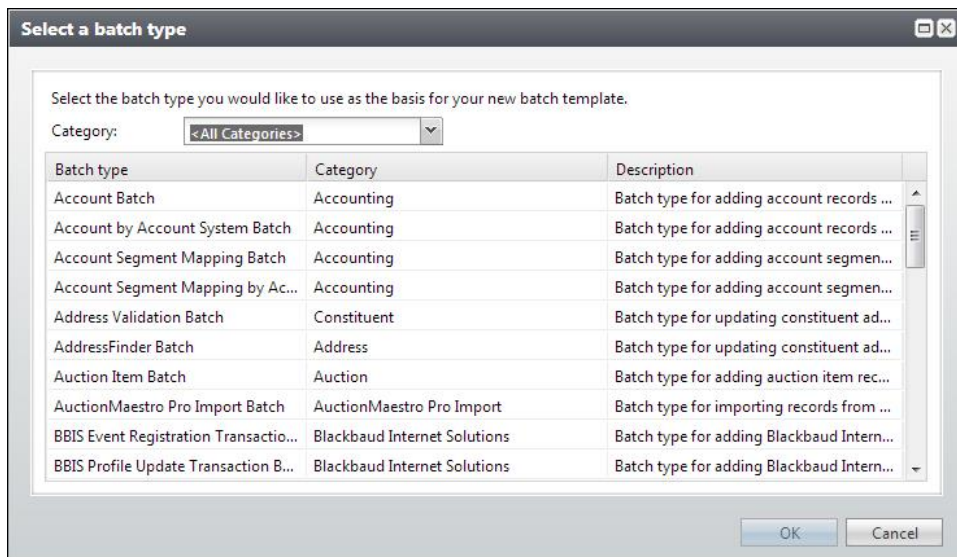
## Delete donation and signup batches

1. From *Web*, click **Manage web transactions** under **Web transactions**. The Web Transactions page appears.
2. At the top of the page, a message explains that manual changes are necessary after you upgrade from a version prior to **Blackbaud CRM 3.0**. Beside the message, click **Delete batches**. The program deletes any donation or signup batches in the **Uncommitted batches** grid.
3. To remove the upgrade message from the Web Transactions page, click **Don't show this again**.

To resume downloading donation and signup transactions, you must create new batch templates for donation and signup transactions that use the Enhanced Revenue Batch and Constituent Update Batch batch types. After you create these batch templates, you must then update the batch assignment settings in *Web* so that donations and signups from your website will use your new batch templates.

## Create batch templates for donation and signup transactions

1. From *Administration*, click **Batch** under **Administration**. The Batch page appears.
2. Click **Batch entry**. The Batch Entry page appears.
3. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
4. In the **Batch templates** grid, click **Add**. The Select a batch type screen appears.



5. In the grid, select a batch type for the batch template.
  - For donations, select "Enhanced Revenue Batch."
  - For signups, select "Constituent Update Batch."

Click **OK**. The Add a batch template screen appears.

6. Apply the settings to the batch template that will define its batches. If you adjusted the default BBIS Donation Transaction Batch and BBIS Signup Batch batch templates that you used previously for donations and signups, you likely want to make the same changes to the new batch templates.
  - a. Under **Let's get started**, enter a name and description for the template, and select a workflow and numbering scheme.

**Note:** The first step of the workflow must be in the editable state. This is necessary to allow the program to create uncommitted batches when you download web transactions and to insert data from website users in the batches. If the first step of the workflow is not in the editable state, the batch template is not available when you update batch assignment settings for donations and signups.

- b. Under **Select fields and defaults**, select the fields to include in batches and default values for those fields. For information about field mapping between **Blackbaud Internet Solutions** and the Enhanced Revenue Batch and Constituent Update Batch batches, see Field Mapping from Website to Batch on page 10.
  - c. Under **Configure options**, select settings for how to commit batches and how to find and update matching constituents.

**Note:** On the Constituent matching and Constituent update tabs, you can overwrite your global data entry settings from *Administration*. For example, the match confidence thresholds on the Constituent matching tab determine whether new constituents match existing records in your database, and you may want to use a distinct set of thresholds for web transactions. Likewise, the update rules on the Constituent update tab determine how to resolve data conflicts on matched constituents, and you may want to require manual reviews for web transactions even if you don't require them elsewhere so that you can review data conflicts on the batches before you commit the transactions to the

database. For information about constituent match settings and constituent update rules, see the *Administration Guide*.

- d. Under **Set Permissions**, assign permissions to edit the batch template.
- e. Under **Confirm and save**, review your batch template information to ensure that the fields and options are correct.

For more information about the Add a batch template screen and how to set up batch templates, see the *Batch and Import Guide*.

7. Click **Save**. You return to the Batch Templates page.

After you create batch templates for both donations and signups, you are ready to update the batch assignment settings for those web transactions.

## Update batch assignment settings for donation and signup transactions

1. From *Web*, click **Manage web transactions** under **Web transactions**. The Web Transactions page appears.
2. On the Batch assignment settings tab, select the batch assignment setting and click **Edit**. The Edit batch assignment setting screen appears.

**Note:** Make sure to update all batch assignment settings for donations and signups.

Specify how to assign transactions to batches. The batch assignment setting determines the type of transaction, and the batch assignments determine the batch and batch owner for each transaction.

Transaction type:   Mark as default for this transaction type

Name:

Description:

**Batch options**

Max transactions per batch:

Batch assignments + Add Edit Delete ↑ ↓

Name	Assign by	Selection	Owner	Batch tem...	Security gr...	Constituen...
Page ID	Donation 2...	Adam Bue...	Les ERB wit...	School of ...		
Default	All transact...	Default ow...	Les ERB wit...			

Help Save Cancel

3. Under **Batch options**, select a batch assignment and click **Edit**. The Edit batch assignment screen

appears.

**Note:** Make sure to update all batch assignments for the donations and signups.

**Edit batch assignment**

Name:

**Transaction filters**

Assign by:

Assign by page
Donation 2.0 Page
Event Registration 2.0 Page
*

**Batch owners**

Batch template:

Select owners for batch assignment:

Owner
*

**Default settings**

Default constituent security group:

Constituent site:

Default account system:

Default tribute:

OK Cancel

4. In the **Batch template** field under **Batch owners**, select your new batch template.
  - For donations, select the Enhanced Revenue Batch batch template that you created for web transactions.
  - For signups, select the Constituent Update Batch batch template that you created for new user registrations.

**Note:** The batch template must use a workflow where the first step is in the editable state. This allows the program to create uncommitted batches when you download web 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's dropdown list.

For more information about batch assignment settings for these web transactions, see the *Web Transactions Guide*.

5. Click **OK**. You return to the Edit batch assignment screen.
6. Click **OK**. You return to the Web Transactions page.

After you update the batch assignment settings for create batch templates for both donations and signups, you are ready to resume downloading transactions from your website.

## Restart automatic downloads for web transactions

1. From *Web*, click **Manage web transactions** under **Web transactions**. The Web Transactions page appears.
2. Under **Tasks**, click **Start download process**.

**Note:** To manually download web transactions, you can select a transaction type on the Web Transactions page and click **Download**.

3. The program resumes automatic downloads for web transactions. For donation and signup transactions, transactions are downloaded into uncommitted batches that use the new batch templates that you specified on the Edit batch assignment screen.

**Tip:** To stop automatic downloads again, click **Stop download process** under **Tasks**.

## Website Data in Enhanced Revenue Batch and Constituent Update Batch

**Tip:** For more information about Enhanced Revenue Batch and Constituent Update Batch, see the *Web Transactions Guide*.

After you complete the manual steps to process donation and signup transactions from your **Blackbaud Internet Solutions** website, you manage downloaded web transactions on the Web Transactions page in *Web* just as you did previously. The only difference is that the new Enhanced Revenue Batch and Constituent Update Batch batches display data in different locations than the old BBIS Donation Transaction Batch and BBIS Signup Transaction Batch batches.

For example, the old batches displayed data on the tabs of the Review transaction data screen, which you opened from the batch data entry screen. On the new batches, most data now appears directly in the rows of the batch data entry screen, and Enhanced Revenue Batch displays constituent information in the Constituent Window.

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.

The screenshot shows the 'Batch 1\_Leslie' application window. The 'Revenue' tab is active, displaying a table of donation details. The table has columns for 'Account system', 'Constituent', 'Lookup ID', 'Amount', and 'Date'. The first row is highlighted and contains the following data: 'System Generated Acco...', 'Cooper Tires', a blank 'Lookup ID', '\$45.00', and '2/13/2013'. A red circle highlights the 'Edit note' button in the 'Note' section of the top navigation bar. Another red circle highlights the text 'See donation note for important downloaded information.' in the first row of the table. Below the table is a 'Constituent Window' with tabs for 'Organization' and 'Information'. The 'Information' tab is active, showing a table with columns for 'Application', 'Application amount', 'Organization', and 'Amount'. The first row of this table contains 'Donation - LS Campaign, A-LS F...', '\$45.00', and a blank 'Organization' field. The page number '1 of 1' is visible at the bottom.

Account system	Constituent	Lookup ID	Amount	Date
System Generated Acco...	Cooper Tires		\$45.00	2/13/2013

Application	Application amount	Organization	Amount
Donation - LS Campaign, A-LS F...	\$45.00		

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.

**Edit note**

**Payment for Cooper Tires**

Type: Revenue online note      Date: 2/13/2013

Title: Web transaction information

Author: [Empty]

Notes:

Donation message: We are excited to partner with you in this cause!  
 -----  
 Corporate gift submitted by Mr John Cooper.  
 -----  
 The donor has requested that a letter be mailed on their behalf to:  
 Margaret Burton  
 3724 Wilson Street  
 Lansing, OH 23411  
 743-234-1234  
 MargaretBurton@bb.com  
 -----  
 Submitted spouse information  
 Title: Mrs.  
 First name: Kelsey  
 Middle name: White

Help      Save      Cancel

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.

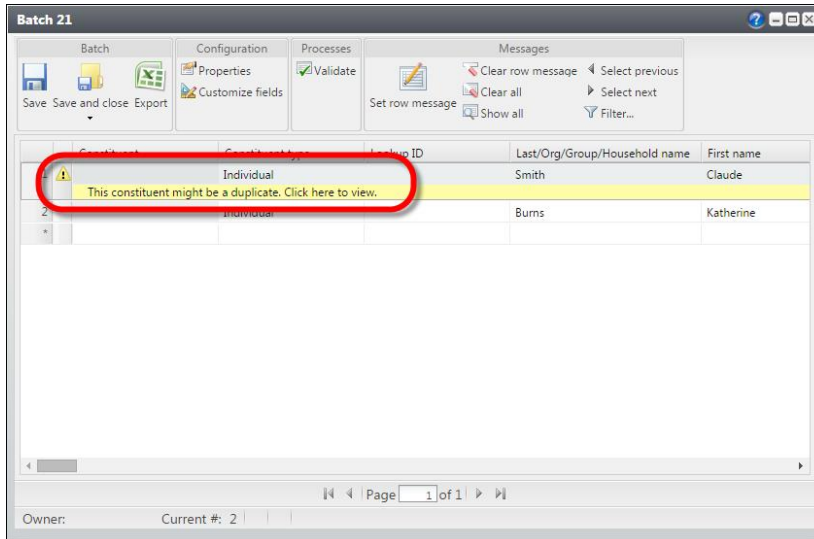
- For corporate gifts, after you commit the batch, you may want to check the organization record for a relationship to the individual who submitted the gift. If the individual is in your database but no relationship exists, you may want to add a relationship.
- For matching gifts, you can click **Matching 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 a Constituent Update Batch or 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.

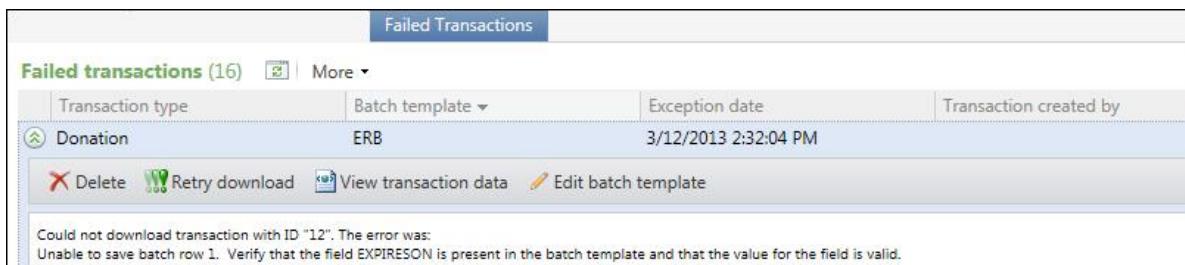


To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record. For information about the duplicate resolution screen, refer to the *Web Transactions Guide*.

**Note:** If you click the binoculars in the **Individual** or **Constituent** columns 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.

## 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 lists the transactions and the reasons they failed. Transactions appear 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.

## Field Mapping from Website to Batch

Review the following data map tables for information about field mapping between **Blackbaud Internet Solutions** and the Enhanced Revenue Batch and Constituent Update Batch batches that are now used to process donation and signup transactions in **Blackbaud CRM**.

### Donation Form

The following tables describe the default field mappings for the Donation Form part in **Blackbaud Internet Solutions**. The tables list the fields that are available on donation forms and then indicate where that data appears on the Enhanced Revenue Batch and where it is saved in **Blackbaud CRM** after you commit batches.

#### Individual Gift

This table shows the default field mappings for an individual gift on the Donation Form part.

Field on Donation Form in <b>Blackbaud Internet Solutions</b>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
Giving level designation	N/A	N/A	<b>Blackbaud CRM</b> does not support this field.
Amount	Amount	Revenue	Edit payment task, Amount field
Designation	Designation	Revenue	Edit payment grid, Designation field
"Other" designation	N/A	N/A	<b>Blackbaud CRM</b> does not support "other" designations.
Frequency	Installment frequency	Revenue	Edit recurring gift task, Frequency field

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
<b>Corporate</b>	Company name maps to <b>Constituent</b> ; website user's name is attached to the batch as a note on the Edit note screen	Revenue	Inserts the <b>Company</b> field into the <b>Billing Information</b> section of the donation form
<b>Anonymous</b>	<b>Given anonymously</b>	Revenue	<b>Edit payment</b> task, <b>Payment is anonymous</b> checkbox
<b>Comments</b>	Attached to the batch as a note on the Edit note screen	Revenue	Revenue record, Documentation tab, <b>Notes</b> grid
<b>Gift Attributes</b>	Maps to user-specified attribute fields	Revenue	Attributes tab
<b>How did you hear about our site (Source field)</b>	<b>Appeal</b>	Revenue	Details tab, <b>Details</b> grid, <b>Appeal</b> field
Billing name fields	Under <b>Personal</b> on the Individual tab of the Constituent Window	Constituent	Personal Info tab
Billing address block	<b>Country</b> and <b>Address</b> fields under <b>Primary contact</b> on the Individual tab of the Constituent Window	Constituent	Contact tab
Billing phone	<b>Phone number</b> field under <b>Primary contact</b> on the Individual tab of the Constituent Window	Constituent	Contact tab
Billing email	<b>Email address</b> field under <b>Primary contact</b> on the Individual tab of the Constituent Window	Constituent	Contact tab
<b>Payment Method</b>	<b>Payment method</b>	Revenue	<b>Edit payment</b> task, Payment information tab, <b>Payment method</b> field

## Credit Card Gift

This table shows the default field mappings for credit card information on the Donation Form part.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
<b>Cardholder's Name</b>	<b>Name on card</b>	Revenue	<b>Edit payment</b> task, Payment information tab, <b>Name on card</b> field
<b>Credit Card Number</b>	<b>Card number</b>	Revenue	<b>Edit payment</b> task, Payment information tab, <b>Card number</b> field
<b>Card Type</b>	<b>Card type</b>	Revenue	<b>Edit payment</b> task, Payment

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
			information tab, <b>Card type</b> field
Card Expiration	Expires on	Revenue	<b>Edit payment</b> task, Payment information tab, <b>Expires on</b> field
Card Security Code	N/A	N/A	<b>Blackbaud CRM</b> does not support this field.

## Direct Debit Gift

This table shows the default field mappings for direct debit information on the Donation Form part. Financial institution data defaults to the Accounts tab for a constituent. In Blackbaud CRM, you can also enter this information in *Revenue* from the **Manage financial institutions** task.

**Note:** To display the **Account** field on batches, you must include it on the batch template, but the rest of the direct debit fields automatically map to the Add financial account screen that you can access from the batch data entry screen. To open the Add financial account screen, click the icon in the **Account** field.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
<b>Financial Institution</b>	Attached to the batch in the <b>Financial institution</b> field on the Add financial account screen.	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Financial institution</b> field
<b>Branch Name</b>	Attached to the batch in the <b>Branch</b> field on the Add financial account screen	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Branch</b> field
<b>Routing Number</b>	Attached to the batch in the <b>Routing number</b> field on the Add financial account screen	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Routing number</b> field
<b>Account Number</b>	<b>Account</b> Also attached to the batch in the <b>Account number</b> field on the Add financial account screen	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Account number</b> field
<b>Account Type</b>	Attached to the batch in the <b>Account type</b> field on the Add financial account screen	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Account type</b> field
<b>Account Holder's Name</b>	Attached to the batch in the <b>Name on account</b> field on the Add financial account screen	Constituent	Revenue tab, Accounts tab (tier two level), <b>Edit</b> action, <b>Name on account</b> field

## Bill Me Later

This table shows the default field mappings for a pledge on the Donation Form.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
Bill me later	Revenue type with a value of "Pledge"	Revenue	New pledge

## Recurring Gift

This table shows the default field mappings for a recurring gift on a Donation Form part.

**Note:** Recurring gift fields automatically map to the **Recurring gift date**, **Frequency**, **Starting on**, and **Ending on** fields on the Installment schedule screen, and you can also include them on the batch template to display them on the batch data entry screen itself. To access the Installment schedule screen, click **Edit installments** under **Pledge & recurring gift** on the Revenue tab.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
Frequency	Installment frequency	Revenue	Edit recurring gift task, Frequency field
On	Date	Revenue	Edit recurring gift task, Next transaction field
Starting	Installment start date	Revenue	Edit recurring gift task, Date field
Ending	Installment end date	Revenue	Edit recurring gift task, Ending on field

## Matching Gift

This table shows the default field mappings for a matching gift on the Donation Form part.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
My company will match my gift	Attached to the batch as a note on the Edit note screen	Revenue	Matching Gifts tab
Company	Attached to the batch as a note on the Edit note screen	Revenue	Matching Gifts tab, Edit action, Matching organization field

## Tribute Gift

This table shows the default field mappings for a tribute gift on the Donation Form part.

**Note:** Tribute fields automatically map to the Tributes and Edit note screens that you can access from the batch data entry screen. You do not need to add them to the batch template. To open the Tributes screen, click **Tributes** under **Revenue Details** on the Revenue tab. To open the Edit note screen, click **Edit note** under **Note** on the Revenue tab.

Field on Donation Form in <i>Blackbaud Internet Solutions</i>	Field in the Enhanced Revenue Batch	Blackbaud CRM Record Type	Blackbaud CRM Field/Outcome
<b>Tribute Type</b>	Attached to the batch in the <b>Tribute</b> column of the Tributes screen	Tribute	<b>Edit tribute</b> task, <b>Tribute type</b> field
<b>Description</b>		Tribute	<b>Edit tribute</b> task, <b>Tribute text</b> field
<b>Full Name</b>		Tribute	<b>Edit tribute</b> task, <b>Tributee</b> field
<b>Acknowledgee Name</b> (includes Address block, <b>Phone</b> , and <b>Email</b> )		N/A	When you process data for these fields in an Enhanced Revenue Batch, the data is attached to the batch as a note on the Edit note screen. To store the information, you must manually copy and paste it from the note to the constituent record.

## User Login

This table describes the default field mappings for the User Login part's new registration form in *Blackbaud Internet Solutions*. The table lists the fields that are available on the user registration forms and then indicates where the data from these fields appears on the Constituent Update Batch and where the data is saved in *Blackbaud CRM* after you commit a batch.

Field on New User Registration Form in <i>Blackbaud Internet Solutions</i>	Field in Constituent Update Batch	Record Type in <i>Blackbaud CRM</i>	Field/Outcome in <i>Blackbaud CRM</i>
<b>Title</b>	<b>Title</b>	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>Title</b> field
<b>First Name</b>	<b>First name</b>	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>First name</b> field
<b>Last name</b>	<b>Last name</b>	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>Last name</b> field
<b>Preferred Email</b>	<b>Email addresses</b>	Constituent	Contact tab, <b>Edit</b> action, <b>Email address</b> field <i>Note: Set as primary email address</i> checkbox designates preferred email address.

Field on New User Registration Form in <i>Blackbaud Internet Solutions</i>	Field in Constituent Update Batch	Record Type in <i>Blackbaud CRM</i>	Field/Outcome in <i>Blackbaud CRM</i>
Home Phone	Phones	Constituent	Contact tab, <b>Edit</b> action, <b>Number</b> field; Type field set to "Home" <i>Note:</i> The <b>Set as primary phone number</b> checkbox designates the primary phone number. By default, the first phone number added is the primary number.
Address type, Country, Address lines, City, State, ZIP	Addresses	Constituent	Contact tab
Gender	Gender	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>Gender</b> field
Maiden name	Maiden name	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>Maiden name</b> field
Class of	This is used for auto-match only and does not map to a field in the batch.	Constituent	Education tab, <b>Education</b> grid, <b>Edit</b> action, <b>Class of</b> field
Birth date	Birth date	Constituent	Personal Info tab, Personal tab (tier two level), <b>Personal information</b> grid, <b>Edit</b> action, <b>Birth date</b> field
Lookup ID	Lookup ID	Constituent	Constituent record summary, <b>Lookup ID</b> field
Attribute	Maps to user-specified attribute fields	Constituent	Attributes tab
Interests	Interests	Constituent	Personal Info tab, Personal tab (tier two level), <b>Interests</b> grid